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PLACES



INTRODUCTION

The St. Louis Equitable Economic Development Framework is dedicated to expanding equitable economic opportunities for all current and future city residents and strategically focusing on activities that result in growth of jobs, neighborhoods, job training, and city population. As such, the framework must be grounded in the issues that impact businesses, employees, and residents every day.

The conditions that impact job and business growth vary significantly from one corner of the city to another. The ability to expand an existing business in St. Louis, create a new small business, move a new business into the city, retain and attract employees and/or access a job are all deeply connected to the character and quality of the place. Some places in St. Louis are entirely industrial while others are small, neighborhood-serving commercial corridors. Some places are successful and fully occupied employment hubs while others are adversely affected by vacant and underutilized property. Each place has a personality that may be ideal for certain economic activity and jobs, but not others. The opportunity is to align potential business activity with the places that will help them to thrive. All corners of St. Louis will benefit from this approach.

This is particularly true for existing businesses that often face a number of challenges from hiring to deteriorating infrastructure. These employers have invested in their locations and are committed to the areas they serve. A targeted approach to improvement that takes into account their needs would reduce the “business quality of life” challenges that takes time away from fulfilling their goals. Better places will better position existing businesses for success by helping to attract customers, expand, or more effectively serve the needs of nearby neighborhoods.

The opportunities for new businesses in the city as identified in this document have different physical needs. Facility size, proximity to other similar businesses (or suppliers), available infrastructure, access to transit and the range and type of amenities for employees all factor into decisions about where to work, start or expand a business. To support the needs of existing businesses and realize many of the cluster strategies, St. Louis needs to take a place-based approach to economic development.

In discussing places in St. Louis, we cannot overlook the impact of racism and racial segregation still visible today that creates significant inequities in both investment and job opportunities for people of color. As noted in other chapters of this document, north St. Louis is over 93% Black and has experienced the greatest overall decline in population and jobs across the City. Communities such as Bevo Mill, Carondelet and Dutchtown in south St. Louis represent some of the City’s most ethnically diverse communities and face significant challenges with respect to poverty and unemployment. An equitable approach to economic development must disrupt this legacy and increase economic opportunities in historically disadvantaged areas.

This plan recognizes that some of the greatest opportunities for reinvestment reside within and next to the city’s historically redlined areas, including the north and south riverfronts. Other areas, such as the Mark Twain/I-70 industrial district and many neighborhood retail corridors, have also experienced decline in the context of nearby population loss and disinvestment. This work explicitly highlights the need and opportunity to invest in these places and identifies a range of actions to help re-purpose empty land and connect nearby communities with job opportunities.



EACH PLACE HAS A PERSONALITY THAT MAY BE IDEAL FOR SOME ECONOMIC ACTIVITY AND JOBS BUT NOT OTHERS. THE OPPORTUNITY IS TO ALIGN POTENTIAL BUSINESS ACTIVITY WITH THE PLACES THAT WILL HELP THEM TO THRIVE.

St. Louis, 1933
Source: www.stltoday.com

BACKGROUND

THE CITY OF ST. LOUIS HAS THE HIGHEST CONCENTRATION OF JOBS PER SQUARE MILE IN THE STATE OF MISSOURI.

St. Louis is a large and diverse city that historically developed around commerce and job growth – first along the river and later around freight rail and highways. Today, the City of St. Louis spans 39,600 acres – approximately 62 square miles – and represents about 0.7% of the MSA's land area. The City of St. Louis has the highest concentration of jobs per square mile in the state of Missouri. It contains 3.2K jobs per square mile, nearly three times the density in St. Louis County (1.1K jobs per square mile) and six times the density in Jackson County (520 jobs per square mile). These factors establish St. Louis as the authentic urban place within the region both historically and today.

Like other cities, jobs and businesses often concentrate around key assets like infrastructure, major institutions, access to employees or other similar businesses. To provide a much clearer picture of city employment, this framework identified and evaluated different geographies where the city's jobs and businesses are concentrated. This is necessary to understand the specific challenges facing businesses in different places and to identify current land utilization and opportunities for change. By improving and branding specific geographies for different types of jobs and businesses, the city will send clear signals to the market about the expectations for private investment.

To help better understand the location and distribution of jobs in St. Louis, an analysis of land use patterns, job locations, business types, vacancy and proposed and recent investments was completed. This analysis identified 13 main employment districts and centers (see Figure B-1) that account for 60% of the city's jobs on only about one-quarter of the city's land. For those districts and centers that do not already have a recognized name, one was provided to help quickly refer to the data, challenges, and opportunities in each place. Many of the remaining private sector jobs in the city are stretched along the city's commercial corridors. Employment districts and centers, and commercial corridors are not limited to the existing neighborhood boundaries of the city. Rather, these geographies have the potential to provide job opportunities for multiple neighborhoods.

This study distinguishes employment "districts" from employment "centers" to acknowledge the different conditions and strategies required to improve a place that is mixed-use (districts) as opposed to those that are largely industrial and commercial.

Figure B-1. Employment and population density

	Population, 2018	Private Jobs, 2018	Land Area (sq. mi.)	Population Density	Activity Density (Population & Employment)
City of St. Louis	302.8K	200.1K	61.9	4,890	8,120
St. Louis County	996.9K	556.0K	507.8	1,960	3,060
Rest of MSA	1,504.9K	416.0K	8,053.5	190	240

Source: U.S. Census Bureau American Community Survey 2018 1-year release; QCEW-UDP

Employment Districts & Centers

Source: Interface Studio, 2019

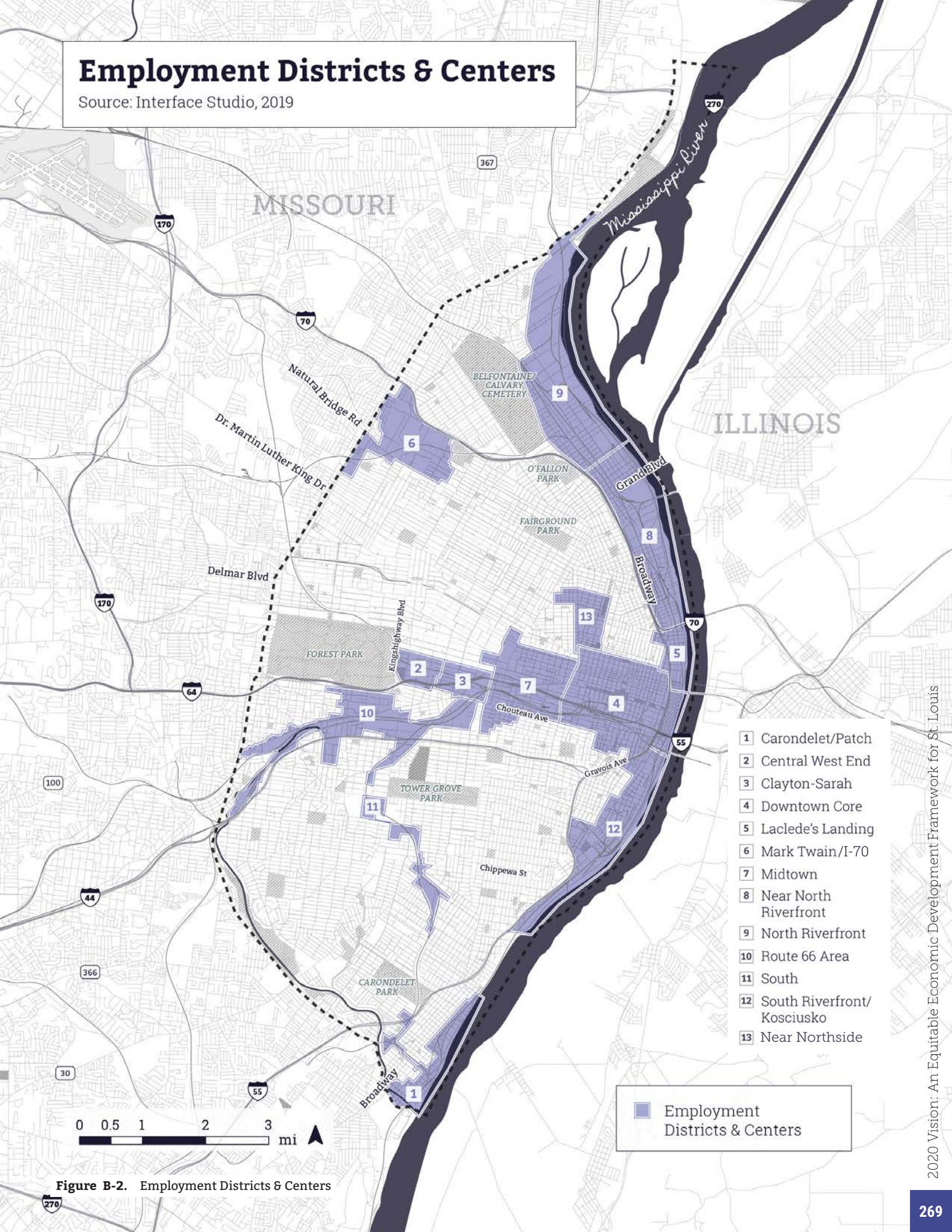


Figure B-2. Employment Districts & Centers

EMPLOYMENT DISTRICTS

PLACES OF EMPLOYMENT WITH ONE OR MORE BUSINESS CLUSTERS AND SUPPORTING INFRASTRUCTURE, AS WELL AS ADJACENT LAND USES THAT SUPPORT BUSINESSES & EMPLOYEES, INCLUDING COMMERCIAL RETAIL, HOUSING, ENTERTAINMENT, ETC. THESE AREAS ARE IDENTIFIED AS MIXED-USE IN CHARACTER.

Employment Districts refer to places of employment with one or more business clusters and supporting infrastructure, as well as adjacent land uses that support businesses and employees, including commercial retail, housing, entertainment, etc. Employment districts include residential uses but are different than neighborhoods and retail streets. While no less important, neighborhoods and retail corridors are typically comprised of smaller businesses with smaller footprints. Employment Districts in contrast, include a high number of concentrated employees and large buildings that require special considerations to manage access, loading, truck traffic and parking. Recognizing the importance of commercial corridors across St. Louis, a special section of this work is devoted to identifying a range and diversity of corridors across the City to focus investment, support small businesses and improve neighborhoods. These areas are identified as mixed-use in character and include:

- › **The Central West End** (as an employment district) is bounded by Kingshighway Boulevard, Forest Park Avenue, Tower Grove Avenue, and Chouteau Avenue. Central West End is 240 acres and holds 28,300 employees, which amounts to 120 jobs per acre.¹ In addition to jobs in healthcare, the district includes additional jobs related to Education and Training and Hospitality and Tourism.
- › **Clayton-Sarah** is located east of Central West End and encompasses Cortex. It is bounded by Forest Park Avenue, Spring Avenue, Chouteau Avenue, Manchester Avenue, and Boyle Avenue. In addition to the growing number of businesses at Cortex, Clayton-Sarah is also a center for Business Services and retail (e.g., IKEA).

- › **The Downtown Core** is bounded by Carr Street, Jefferson Avenue, Chouteau Avenue, Park Avenue, and the Mississippi River. With the completion of Union Station Aquarium and an MLS stadium, the Downtown Core will remain the centerpiece of the regional economy with key industries including Business and Financial Services, Marketing & Publishing, and Hospitality & Tourism.
- › **Laclede's Landing** is located immediately north of the Arch and is bounded by Eads Bridge, Mississippi River, Memorial Bridge, Cass Avenue, 7th Street, Cole Street, and 4th Street. Largely due to the Casino, Hospitality & Tourism is the largest industry.²
- › **Midtown** is located between the Downtown Core and Central West End/ Clayton-Sarah. Midtown includes major educational and health institutions, the city's arts and cultural uses in Grand Center and a growing number of retailers and small businesses along Locust Street. Education & Training, Financial and Business Services, Health Services, Commercial Services and the Performing Arts are Midtown's key industries.
- › **Near Northside** is an emerging employment district, where the NGA (National Geospatial-Intelligence Agency) West Headquarter is to locate. The district is bounded by 20th Street, Carr Street, Dr. Martin Luther King Drive, Elliott Avenue, Benton Street, and St. Louis Avenue and is surrounded by residential neighborhoods, a pharmaceutical company, and nearby schools.

¹ YTS data; QCEW-UDP; Mass Economics Analysis, 2019; Note that employment number includes coworking space/self-employed employment estimates

² YTS data; QCEW-UDP; Mass Economics Analysis, 2019

Employment Centers refer to places of employment with multiple businesses but without nearby retail stores, restaurants, housing, entertainment, etc. These areas are largely industrial or commercial and include:

- › **Carondelet and Patch** employment center is located at the southern tip of the city and is bounded by Dover Street, Mississippi River, the River des Peres Drainage Channel, and weaves through multiple commercial and industrial uses until the intersection of Interstate 55 and Germania Street. The employment center's key industries are manufacturing (e.g., food, furniture, metals, chemicals) or distribution-related. Development in this employment center needs to navigate the challenges of flooding and flood plain restrictions.
- › **Mark Twain/I-70** located near the intersection of the city's western boundary and I-70. Mark Twain/I-70's key industries include various manufacturing and TDL.
- › **Near North Riverfront** is bounded by the Mississippi River, Interstate 70, and Adelaide Avenue. This area includes the Municipal River Terminal near Market Street and is largely (44%) industrial. Key industries include TDL and food processing and distribution.
- › **North Riverfront** is located between the Near North Riverfront employment center and the northern edge of the city's boundary. TDL and real estate and construction-related activities are the key industries in this area.
- › **Route 66**, which tracks several rail lines, is surrounded by dense residential neighborhoods southwest of Forest Park to the north and south of Manchester Avenue and roughly bounded by Interstate 44, Vandeventer Avenue, 39th Street, and Oakland Avenue. Key industries of the Route 66 Area are largely industrial (metals, chemicals, construction, distribution) and it is home to about a fifth of the city's manufacturers.
- › **South Riverfront and Kosciusko** is located south of the Downtown Core and bounded by Mississippi River, Dakota Street, Chouteau Avenue, Broadway, and Interstates 55 and 44. The area is known as the home to Anheuser-Busch, which occupies a large share of its land. The district includes additional corporate campuses including Millipore-Sigma, as well as the existing NGA site. Food and beverage processing and manufacturing and TDL are key industries, but there remains some vacancy that could be redeveloped to support expansion of industrial and commercial activities.
- › **South St. Louis** is located to the south of Tower Grove Park. It includes a few of the city's main commercial corridors, including Kingshighway, Gravois Avenue, and Chippewa Street. Real estate and construction, and urban manufacturing (which makes up almost one third of jobs) are the key industries in this employment center.

EMPLOYMENT CENTERS

PLACES OF EMPLOYMENT WITH MULTIPLE BUSINESSES BUT WITHOUT INTEGRATED RETAIL STORES, RESTAURANTS, HOUSING, ENTERTAINMENT, ETC. THESE AREAS ARE LARGELY INDUSTRIAL OR COMMERCIAL.

In addition to employment districts and centers, **Commercial Corridors** refer to places of commerce and employment that extend multiple blocks and serve local neighborhood and/or regional shopping and service needs. There are currently 1,407 acres of space zoned for commercial activity along these corridors outside of the employment districts and centers. The space zoned for commercial activity along these corridors has remained largely unchanged since the city's peak population of 850K.³ With a population today of 302.8K,⁴ the result is a high commercial vacancy rate (including vacant buildings and land) across all corridors of 15% with significant variation from one corridor to another.

3 A Brief History of St. Louis. (n.d.). Retrieved September 19, 2019, from city of St. Louis website: <https://www.stlouis-mo.gov/visit-play/stlouis-history.cfm>

4 U.S. Census Bureau American Community Survey 2018 1-year estimates

COMMERCIAL CORRIDORS

PLACES OF COMMERCE AND EMPLOYMENT THAT EXTEND MULTIPLE BLOCKS AND SERVE LOCAL NEIGHBORHOOD AND/OR REGIONAL SHOPPING AND SERVICE NEEDS.



Natural Bridge Avenue between Union Boulevard & N Kingshighway Boulevard



The Grove



Union Boulevard near St. Louis Avenue

Employment Districts & Centers & Commercial Corridors

Source: Interface Studio, 2019.

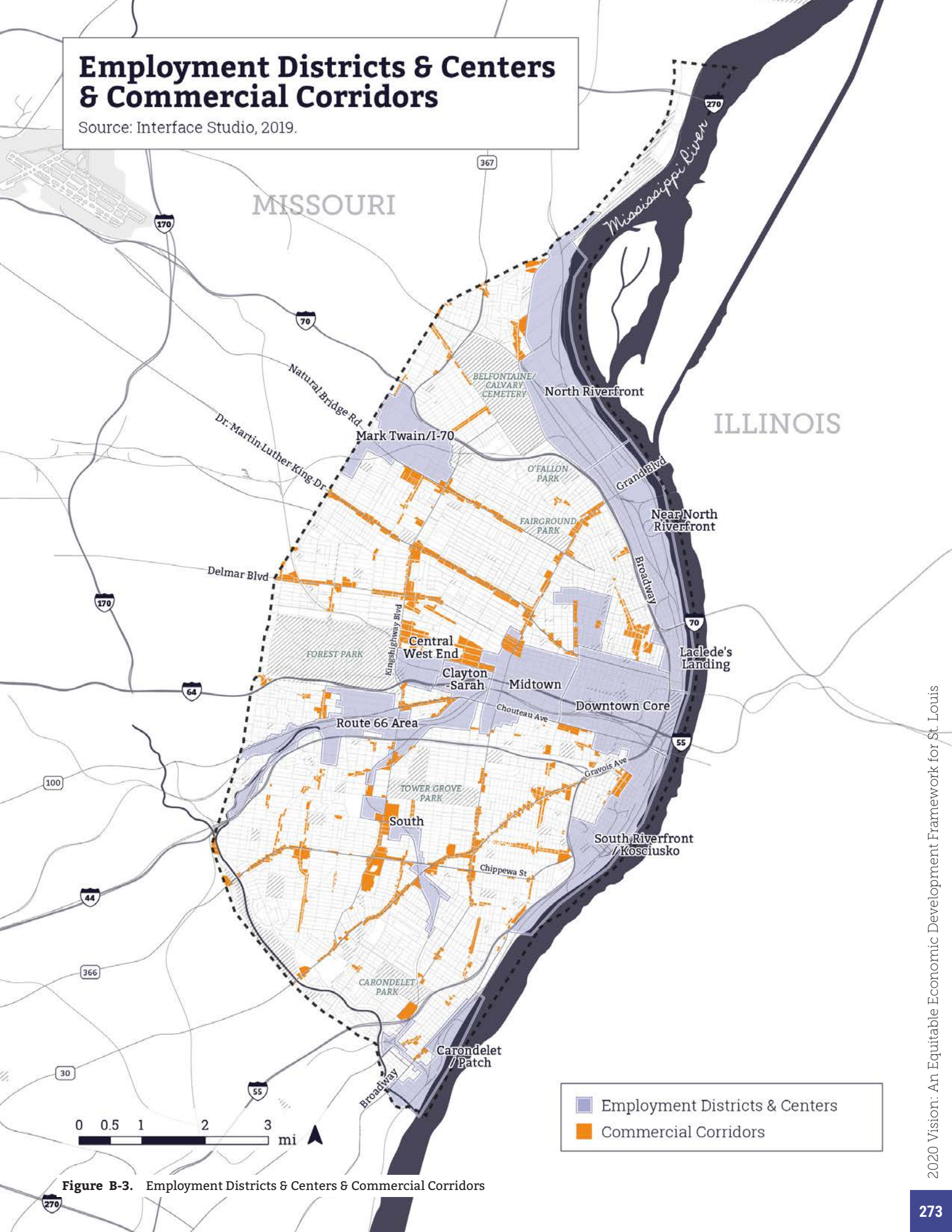


Figure B-3. Employment Districts & Centers & Commercial Corridors

A core opportunity to improve the quality of the city's employment areas is to increase job density. Attracting investors, new businesses and employees to St. Louis is inhibited in some places due to physical deterioration, limited services and aging infrastructure that comes with the reduction in the number of businesses and employees in those districts. Similarly, potential public investments in infrastructure or commercial amenities like streetscape upgrades or lighting can be difficult to implement effectively because of the scattered pattern and levels of active commercial activity along commercial corridors and limited public capital available for such investments.

In the employment districts and centers, there are about 13.0 private jobs per acre, which is nearly 11 more jobs per acre than average across the rest of the city.⁵ However, job densities overall are relatively low compared to other cities with similar uses and mix of industries. For instance, industrial warehouse development in other cities can often see job densities around 10 jobs per acre with flex and other manufacturing uses at even higher densities. While industrial uses will always have a much lower job density due to large foot-print buildings and infrastructure, there is clearly underutilized land and buildings across the city, which drives employment density below 5 jobs per acre in some districts.

Figure B-4. Employment Districts & Centers jobs summary, 2018

Employment Districts/Centers	Employment 2018	Acres	Job density 2018 (Jobs/acre)
Downtown Core	52,600	1,565	33.6
Central West End	28,300	236	119.9
Midtown	27,700	999	27.7
Route 66 Area	10,300	1,266	8.1
South Riverfront / Kosciusko	6,200	1,127	5.5
Near North Riverfront	4,400	1,368	3.2
Mark Twain/I-70	2,700	826	3.3
North Riverfront	2,700	1,951	1.4
Laclede's Landing	2,400	312	7.7
Clayton-Sarah	5,400	280	19.2
South	1,400	308	4.5
Carondelet / Patch	1,000	660	1.5
Near Northside	800	354	2.3
Employment District/Centers Total	145,900	11,242	13.0
Central Corridor Employment Areas*	114,000	3,080	37.0
Rest of City	58,600	28,380	2.1
St. Louis City	204,500	39,622	5.2

*: Central Corridor Employment Areas are Downtown Core, Central West End, Clayton-Sarah, and Midtown
Source: QCEW-YTS, Mass Economics Analysis

⁵ YTS data; QCEW-UDP; Mass Economics Analysis, 2019

Job Density by Employment Districts

Source: YTS data; QCEW-UDP; Mass Economics analysis

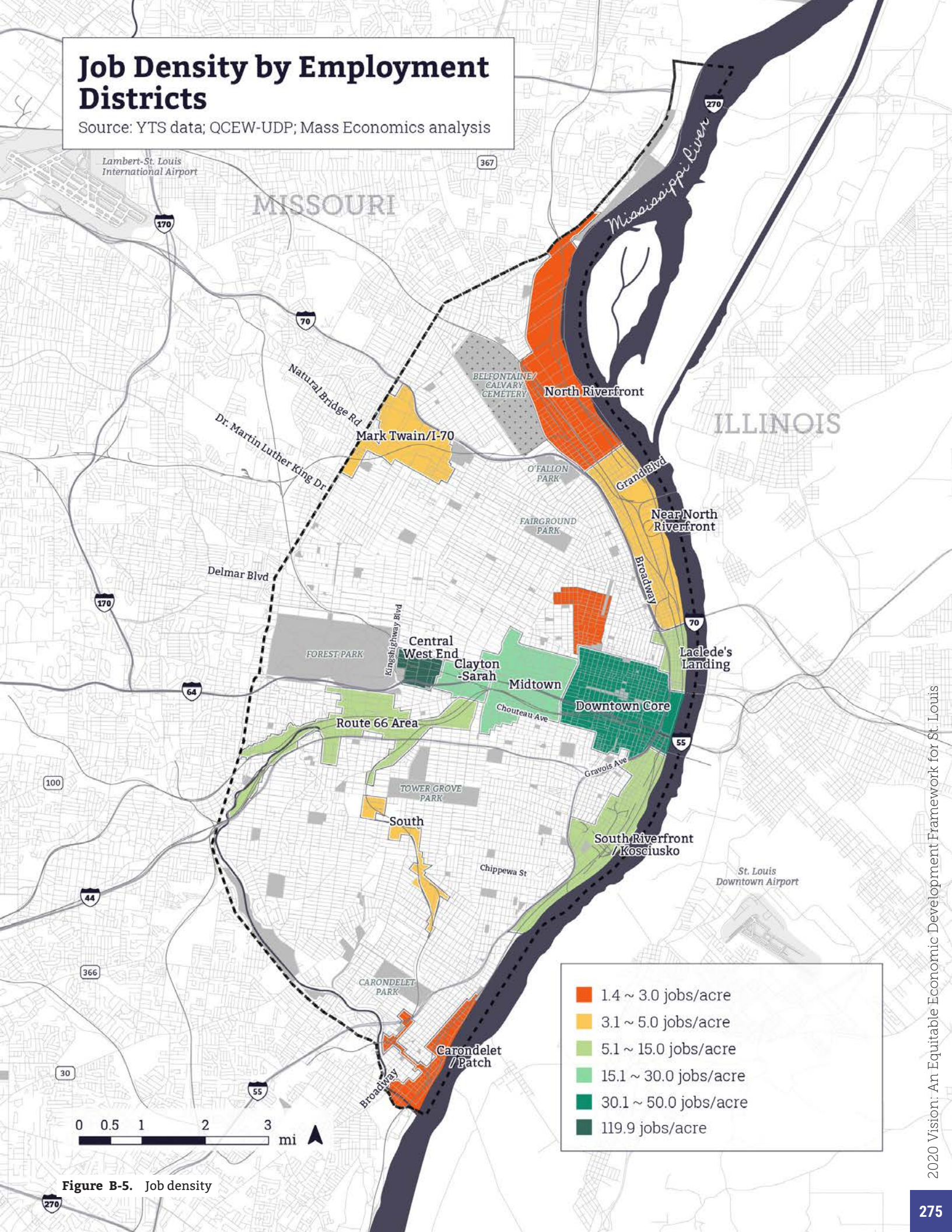


Figure B-5. Job density

27% OF THE PARCELS
WITHIN THE EMPLOYMENT
DISTRICTS & CENTERS
ARE CURRENTLY EITHER
VACANT OR HAVE VACANT
BUILDINGS.

Within the 13 employment districts and centers, there are over 7,400 parcels; 27% of those parcels (approximately 2,000) are currently either entirely vacant or have vacant buildings. In addition, a parcel-by-parcel survey completed during this framework identified over 2,400 properties, or 6% of properties, within employment districts and centers as “underutilized.” Underutilized refers to properties where there is still some clear business activity but that the activity is visibly only using a portion of the available land. This assessment could not be made for buildings at this time so the number of underutilized properties is likely higher.

Vacancy and underutilization impact each district and center differently where some are nearly fully occupied (Central West End) and others are over 20% empty (North Riverfront). Along commercial corridors, there are some locations that are experiencing new investment and provide a large number of jobs. There are other corridors where the vacancy rate is over 30%, existing businesses struggle to attract customers, and there is poor to no maintenance of the surrounding empty properties. Currently, there are 1,738 vacant properties (15%) along the city’s commercial corridors.

Figure B-6. Vacant parcel distribution by size

Vacant Parcel Size	Parcel Count	Share of Vacant Parcels
Less than half an acre	27,653	97.6%
0.5 – 1 acre	317	1.1%
1 – 2 acres	184	<1%
2 – 5 acres	131	<1%
5 – 10 acres	36	<1%
10 – 20 acres	16	<1%
20 – 30 acres	6	<1%
30 acres and above	2	<1%

Source: Interface Studio (2019), Mass Economics (2017), City of St. Louis



Vacant Building on S Broadway near Carondelet-Patch District



Vacant Land in St. Louis Place

Vacancy

Source: Interface Studio (2019), Mass Economics (2017), City of St. Louis

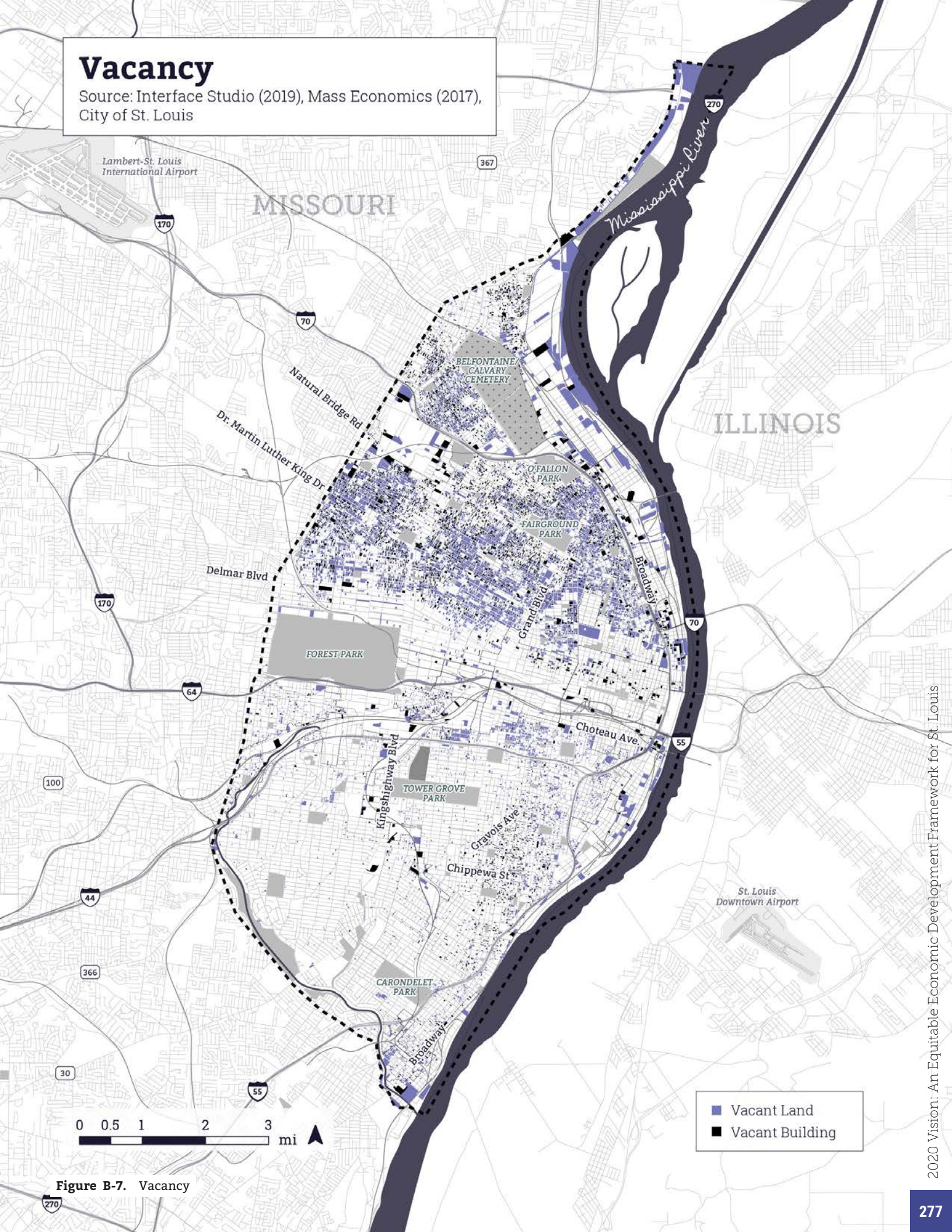


Figure B-7. Vacancy

VACANT LAND OR BUILDINGS IN EMPLOYMENT DISTRICTS OR CENTERS THAT ARE GOOD CANDIDATES FOR ACQUISITION ARE OFTEN SADDLED WITH THE CHALLENGES OF PREVIOUS USES.

Available land for redevelopment is one of the most significant challenges that prevents business expansion and attraction, particularly for companies in need of large sites. It is difficult to meet economic development objectives for specific clusters like manufacturing or transportation, distribution, and logistics (TDL) if the property is not already assembled and market-ready. If sites are not available or acquisition and assembly cannot be completed relatively quickly, it is often easier for companies to simply choose another location where there is available property that serves the needs of the business. In short, availability of turn-key sites has become an important part of cities' ability to attract businesses.

Vacant land or buildings in employment districts or centers that are good candidates for acquisition are often saddled with the challenges of previous uses, including the cost to potentially remediate the site for environmental contamination and improve the site to handle new uses including an investment in demolition, site work and new infrastructure. There are often difficult owners, or entirely absent ones, and the sites themselves may be too small or irregularly shaped to meet the needs of modern industrial or commercial users. There may also be concerns about crime near vacant or abandoned buildings and lots.

Figure B-8. Employment Districts & Centers land use and vacancy summary

Employment Districts/centers	Avg. Parcel size (acres)	Median parcel size (acres)	% of all parcels that are vacant	% of vacant parcels > 5 acres	% of parcel acres that are vacant	% of parcels industrial
Carondelet / Patch	1.0	0.3	22%	6%	18%	26%
Central West End	1.0	0.3	9%	0%	2%	0%
Clayton-Sarah	1.0	0.4	18%	0%	5%	11%
Downtown Core	0.7	0.3	14%	0%	7%	4%
Laclede's Landing	0.5	0.2	45%	0%	37%	7%
Mark Twain/I-70	2.4	0.8	29%	8%	17%	33%
Midtown	0.8	0.2	23%	0%	7%	7%
Near North Riverfront	1.1	0.3	47%	1%	19%	25%
North Riverfront	3.2	0.8	35%	13%	25%	42%
Route 66	1.2	0.5	11%	2%	4%	25%
South	1.6	0.8	15%	3%	10%	37%
South Riverfront / Kosciuszko	1.8	0.6	19%	2%	10%	27%
Near Northside	0.2	0.1	67%	1%	28%	4%

Source: Interface Studio 2019, Mass Economics 2017, City of St. Louis

Of the vacant properties in employment districts and centers, only 36 are over 5 acres and only 4 properties are over 20 acres. For reference, many modern industrial businesses are seeking properties over 20 acres for new facilities. These numbers vary significantly from one district / center to another. In the Central West and Clayton-Sarah, there is very little vacancy not currently proposed for new development. In active employment centers like South St. Louis or Route 66, the vacancy rates are less than 15% and due mostly to vacant smaller properties. However, the North Riverfront and the Near North Riverfront exhibit vacancy rates over 30% and over 45% north of the Casino. This area has been the subject of many development proposals. Again, some of these high numbers are due to the small size of vacant parcels. The vacancy rate by total acreage also varies but only one district – Laclede’s Landing – exceeds 35% vacancy by acreage.

Along commercial corridors, land assembly is complicated by the existing small sizes of properties and the often small, local businesses that operate in the City. Most of these properties are small and difficult to develop on their own; as a result, re-use requires the acquisition of properties from multiple owners, some of whom have completely abandoned their property. The data reflect the reality on the ground. While there is vacancy and a lot of underutilized property, it is difficult to assemble enough land in the right places.

The strategies below highlight the opportunities for place-based investment to help stimulate equitable job growth and improve access to services and employment. To address the cross-cutting challenges that impact many different places within St. Louis, the first strategies relate to planning, management and land assembly. The remainder of this chapter is dedicated to the application of these policies and identification of potential investment to employment districts, employment centers and commercial corridors across the city.

% of land industrial	% of land institutional	% of land commercial	% of land mixed use	Character
35%	0%	12%	0%	Industrial with commercial along S. Broadway
0%	74%	4%	0%	Mixed-use: commercial, office, residential and institutional
11%	1%	34%	1%	Industrial, commercial and institutional
7%	8%	25%	5%	Mixed-use: commercial, office, residential, sports and entertainment
8%	5%	11%	2%	Mixed-use: commercial, office, residential and entertainment
50%	15%	19%	2%	Industrial
14%	40%	20%	2%	Mixed-use: commercial, office, residential and institutional
44%	0%	7%	1%	Industrial
42%	2%	4%	3%	Industrial
32%	12%	25%	1%	Industrial
56%	4%	16%	0%	Industrial, commercial retail
52%	7%	13%	0%	Industrial
11%	17%	1%	0%	Industrial, commercial office

Primary Business Types in Employment Districts & Commercial Corridors

Source: Interface Studio, 2019.

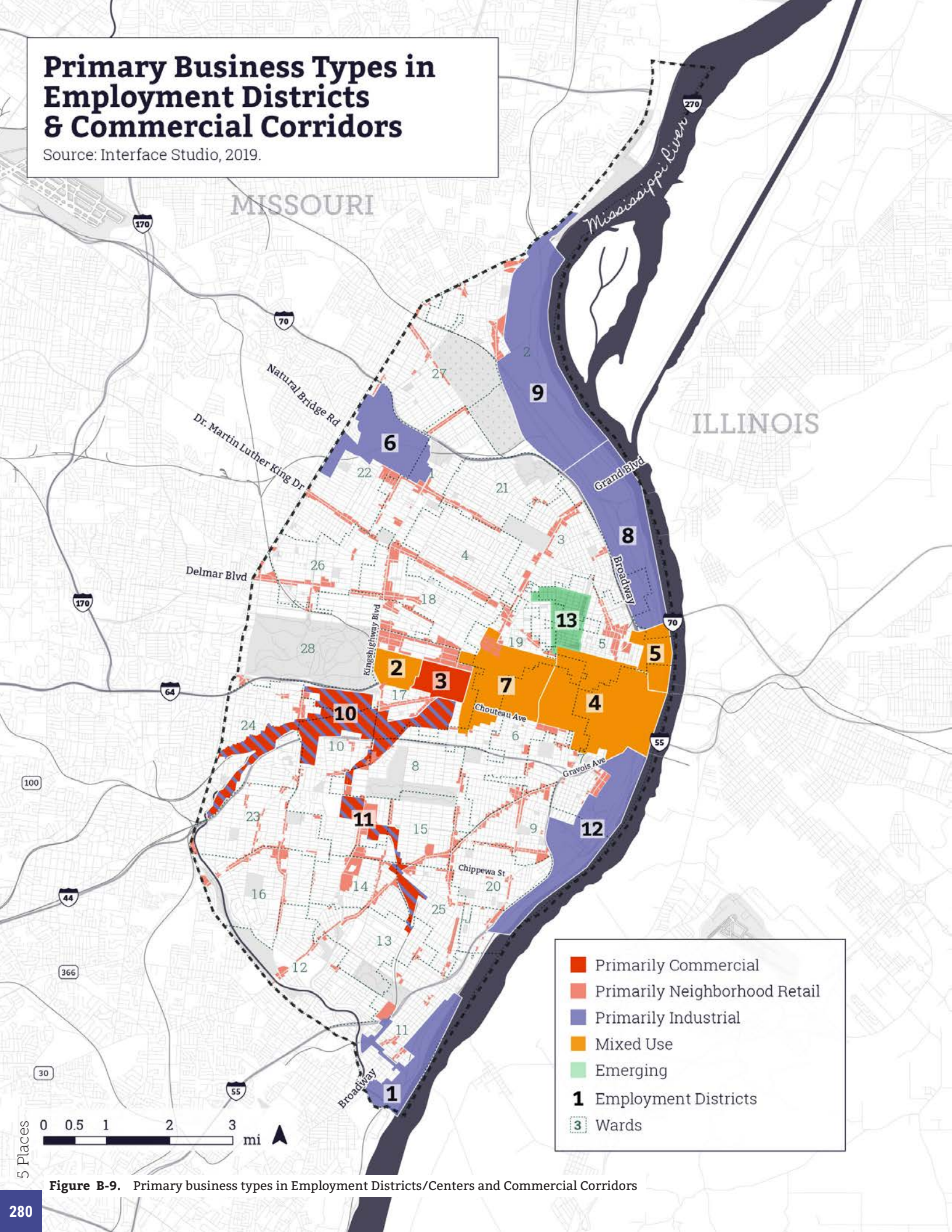


Figure B-9. Primary business types in Employment Districts/Centers and Commercial Corridors

EMPLOYMENT AREAS		KEY PRIVATE INDUSTRIES				
		YELLOW SECTORS ARE GROWING CITYWIDE				
	Carondelet/ Patch					Transportation & Logistics Metals & Chemicals Food Processing & Manufacturing Real Estate & Construction
	Central West End					Health Services Hospitality & Tourism Business Services Education & Training
	Clayton-Sarah					Business Services Household Goods & Services Transportation & Logistics Real Estate & Construction
	Downtown Core					Business Services Marketing & Publishing Hospitality & Tourism
	Laclede's Landing					Business Services Hospitality & Tourism
	Mark Twain/I-70					Government Transportation & Logistics Food Processing & Manufacturing Community & Civic Organizations
	Midtown					Education & Training Business Services Health Services
	Near North Riverfront					Transportation & Logistics Food Processing & Manufacturing
	North Riverfront					Transportation & Logistics Real Estate & Construction
	Route 66 Area					Metals & Chemicals Real Estate & Construction Transportation & Logistics Community & Civic Organizations
	South					Transportation & Logistics Real Estate & Construction Automotive Services Education & Training
	South Riverfront/ Kosciusko					Food Processing & Manufacturing Education & Training
	Near Northside	EMERGING AREA				Geo-spatial Intelligence Pharmaceuticals

Figure B-10. Key industries by Employment Districts/Centers

PLANNING & MANAGEMENT

Overview

PLACES OF EMPLOYMENT NEED PROACTIVE PLANNING AND MANAGEMENT TO THRIVE AND SUPPORT EXISTING BUSINESSES

As with many cities, coordinating resources, investments and planning across political boundaries, organizational boundaries and public and private entities can be difficult. In St. Louis, there are a large number of entities engaged in some form of planning including developers, community groups, advocacy organizations, SLDC, the city, the county, and regional organizations and non-profits. This has resulted in many documents that outline specific issues and needs with respect to racial equity, education, resiliency and greenways, to name a few. Some of these strategies are focused heavily on transforming the physical experience of the city (the Greenway, for instance) while others focus on organizational and policy change. Places of employment need proactive planning and management to thrive and support existing businesses.

The City of St. Louis' Planning and Urban Design Agency (Planning Department) is responsible for maintaining the Strategic Land Use Plan but also coordinates on zoning changes and overlay districts. Recently, the Planning Department launched an initiative to update and undertake neighborhood plans across the city. This work will help to integrate the various initiatives that impact each neighborhood. The neighborhood and other recent plans that currently exist helped to shape the strategies outlined in this document. However, many employment districts, centers and commercial corridors currently lack clear guidance on where to invest or how to guide improvements.

Employment districts and centers need detailed action plans and a prioritized list of

actions and investments to help maximize their potential for job growth. Drawing on the data collected during this process, this planning must rely on an active dialogue with existing businesses and adjacent communities to set priorities for actions and investments that will grow the base of economic activity in each location. The plans must strive to further brand each place with a clear identity that can be reinforced and marketed to prospective employers, as has happened along South Grand Boulevard and Cherokee Street, for instance.

Of the city's employment districts and centers, Carondelet, Mark Twain/I-70, Near Northside, and the South Riverfront are most in need of redevelopment planning. The Near North- and North Riverfront have a detailed strategy completed in 2011 (the North Riverfront Commercial Corridor Land Use Plan). This document needs only an update to ensure the proposed investments in that document align with the needs of key clusters identified in this framework. The Near Northside has been the focus of the Project Connect and NGA relocation efforts. To date, there are efforts to build on the NGA relocation and focus on geospatial and other jobs in that employment center with GeoFutures and other efforts - see a description in Ch. 4: Clusters. Given the increasing investment in Midtown but also the multiple organizations guiding planning and development, Midtown needs coordination and strategic planning but not a full redevelopment effort at this time. Planning for Downtown is currently underway and the Central West End and Clayton-Sarah have plans that currently guide implementation and investment. Districts in South St. Louis - Route 66 and South - are more integrated into the surrounding fabric of commercial and residential uses and should be integrated into upcoming neighborhood plans.

Key Clusters in Employment Districts & Centers

Source: Mass Economics, 2019

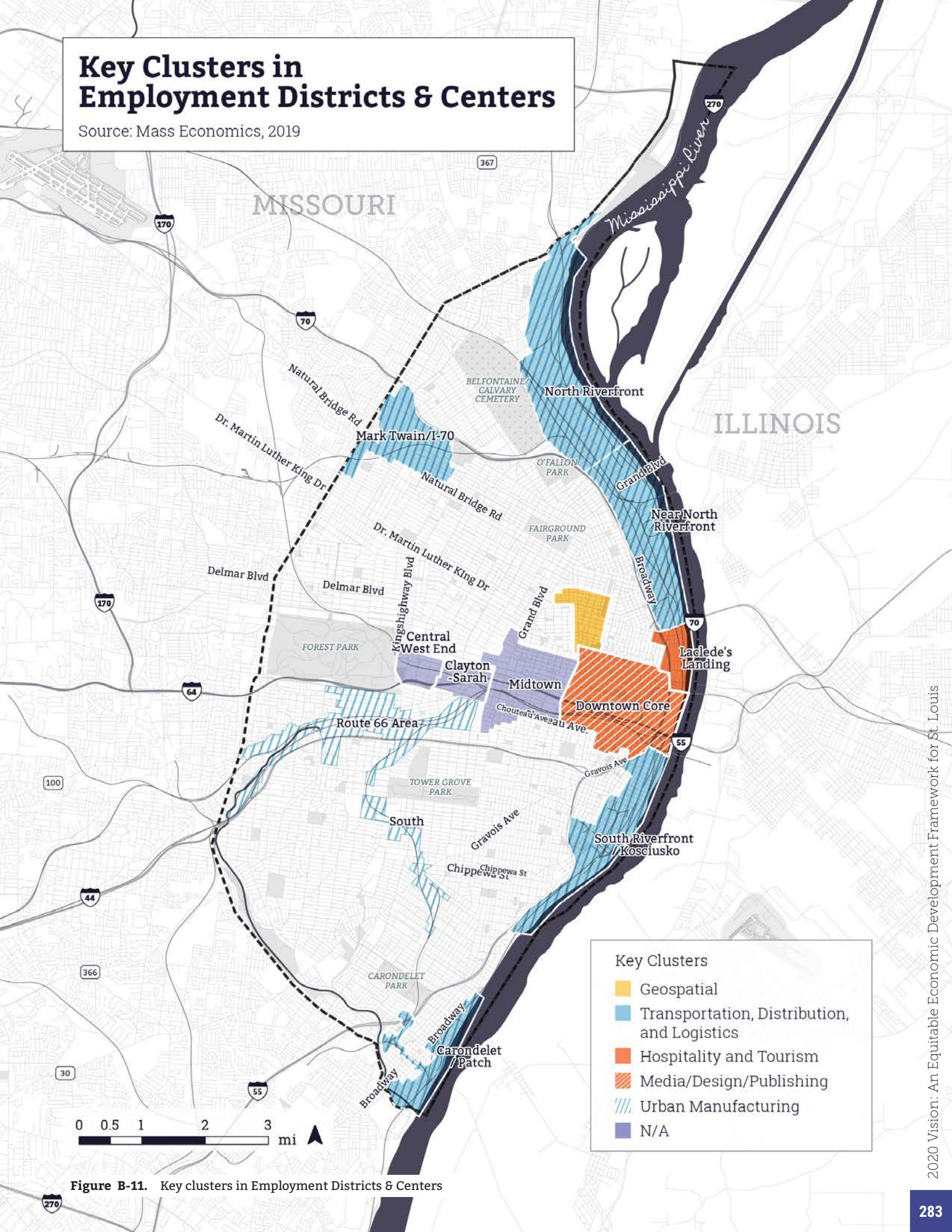


Figure B-11. Key clusters in Employment Districts & Centers

Strategies and Action Items

Strategy
1

Create additional district redevelopment plans to coordinate public and private investment

Redevelopment plans should identify specific land assembly opportunities, infrastructure investments, public realm improvements, and facilities to provide assistance with pre- and post-employment supports for workers to address critical issues like transportation and childcare. This framework has taken a major step in this direction by drafting a vision for each district / center and identifying potential locations to improve streets, intersections, façades and gateways. These specific design opportunities are outlined for each district and center in this chapter.

In order to reduce duplicative work and streamline the planning process, there should be a process to define a range of design standards for improvements that are needed across many districts and centers including lighting, wayfinding, streetscape, art and green buffers.

Action Item #: PM-1.1	Develop employment district design standards for lighting, wayfinding and green buffers
Leader	Board of Public Service, Planning & Urban Design Agency
Potential Partners	Bi-State Development; Board of Aldermen; Community Builders Network members; Commercial District Coalition; East-West Gateway Great Streets team; Great Rivers Greenway; local chapters of AIA, APA, and NOMA; Regional Arts Commission; ULI-St. Louis; community organizations; SLDC
Start Time	Year 1
Duration	2 years
Effort to Implement	Low
Potential Funding	Internal, Board of Aldermen
Goal/s	Clear design standards for district / center improvements
Tracking Progress	Completed and approved design standards

PRECEDENT

WAYFINDING

Coimbra, Portugal

A tall, white, rectangular wayfinding sign stands in front of a modern building with large glass windows. The sign features a green square at the top with the number '6', and a green square below it with the text '6A'. Below these, there are directional arrows and a small map. A person is walking past the sign in the foreground.


Providencia Design

<https://www.behance.net/gallery/5131179/Coimbra-Stadium-signage-and-wayfinding-system>

PRECEDENT

LIGHTING

El Paso, TX

A photograph of a modern building at night, illuminated with vibrant, multi-colored lights. The lights create a rainbow-like effect on the building's facade. The scene is captured from a low angle, looking up at the building.

Bill Fitzgibbons LLC

<https://www.brianwanchophotography.com/blog/2019/06/the-el-paso-passage/>

Action Item #: <u>PM-1.2</u>	Release RFP for planning services to create district redevelopment plans (initial number based on available funding)
Leader	Planning & Urban Design Agency, SLDC
Potential Partners	Invest STL, ULI-St. Louis, community organizations
Start Time	Year 1
Duration	1 year
Effort to Implement	High
Potential Funding	Economic Development Tax
Goal/s	Adopted district redevelopment plans
Tracking Progress	Number of completed redevelopment plans; number of RFPs issued
Action Item #: <u>PM-1.3</u>	Develop expedited permitting for districts with adopted redevelopment plans
Leader	Board of Public Service, Buildings Dept., Business Assistance Center, SLDC
Potential Partners	Board of Aldermen, Commercial District Coalition, Community Builders Network members, Planning & Urban Design Agency, SLEDP (Regional Economic Development and Promise Zone staff), CDFIs providing real estate development support (e.g., IFF), local MWBE developers, regional business chambers
Start Time	Year 1
Duration	2 years
Effort to Implement	Medium
Potential Funding	N/A
Goal/s	Targeted investment and growth
Tracking Progress	Number of issued permits; time to issue permit (from application to approval); start rapid piloting and assessment at the start of Year 2

PRECEDENT

GREEN BUFFER

San Francisco, CA



25th Street Ped Path
<https://www.greenbenefit.org/25th-street-greening>



Strategy
2

Protect industrial use in targeted areas

The city has many vibrant, employment-rich industrial areas. Many of these employment centers should be protected and receive regulatory support and market certainty that land use policy will remain industrial. There are some areas that may no longer be suitable for industrial use and instead transition to commercial or other uses, but it is important to clearly signal where these changes can occur. To help protect and expand industrial jobs in the city, the city has created Business Industrial Preservation Areas (BIPAs) and Business Industrial Development Areas (BIDAs) to reinforce such uses to the current Strategic Land Use Plan. The designated BIPAs and BIDAs should prohibit future non-industrial uses by providing regulatory certainty, restricting spot zoning changes or variances in the future; identify and coordinate capital and infrastructure needs in line with a redevelopment plan to ensure long-term economic viability for industrial users; and provide strong enforcement to disallow land uses inconsistent with industry.

Action Item #: <u>PM-2.1</u>	Develop a plan to review and strengthen the designation of BIPA and BIDA set by the City's Strategic Land Use Plan
Leader	Planning & Urban Design Agency
Potential Partners	Board of Aldermen, Zoning, SLDC
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	Economic Development Tax
Goal/s	Protect industrial use to enhance market certainty
Tracking Progress	Number of properties protected as industrial use

Action Item #: <u>PM-2.2</u>	Conduct a wholesale zoning audit covering everything from the permissibility of garage-workshops in mixed-use neighborhoods to scrap yards in a dense commercial business area
Leader	Zoning, external consultants
Potential Partners	Planning & Urban Design Agency, SLDC
Start Time	Year 1
Duration	12+ months
Effort to Implement	High
Potential Funding	Internal sources
Goal/s	Identify and develop plan to protect prime industrial areas from housing redevelopers and ensure that planned manufacturing areas do not become overbuilt with low job, land-intensive warehouses instead of actual production spaces; assess opportunities for inclusive zoning, form-based codes, and Accessory Commercial Units
Tracking Progress	Comprehensiveness of audit
Action Item #: <u>PM-2.3</u>	Designate protected industrial districts and establish an industrial parcel replacement requirement for the rezoning of non-designated industrial sites
Leader	Planning & Urban Design Agency, Zoning
Potential Partners	SLDC, Board of Aldermen
Start Time	Year 2
Duration	9 months
Effort to Implement	High
Potential Funding	Internal sources
Goal/s	Implement zoning changes as necessary to protect zoning districts
Tracking Progress	Passage of legislation designating and protecting industrial districts

LAND ASSEMBLY

Overview

THE GREATEST
CONCENTRATION
OF OPPORTUNITY
SITES IS LOCATED
IN PREDOMINANTLY
INDUSTRIAL DISTRICTS.

Land assembly involves gathering vacant and underutilized property into one, developable site and is critical to the physical and economic revitalization of the city. As one local stakeholder noted, "Without new approaches, we should assume this level of vacancy and blight for the next 40 years."⁶ To help move the conversation forward regarding land acquisition with respect to the key clusters identified in this framework, initial "opportunity sites" were identified for each employment district and center. Opportunity sites are defined as collections of vacant and/or underutilized properties that are adjacent to one another and could be assembled into larger, developable properties. The process to identify sites accounts for environmental challenges like flooding and reflects specific opportunities to potentially vacate some smaller streets to create larger assemblies. The analysis integrates ownership information to help determine both the number and type of owners (public or private). There are 3 tiers of opportunity intended to describe a potential level of difficulty based solely upon the number and type of owners. Research around environmental conditions and specific owners is necessary to refine this initial opportunity sites analysis.

- › Tier 1A: All properties with each site are owned by one public entity.
- › Tier 1: All parcels within each site are publicly-owned. This may include multiple public entities.
- › Tier 2: Parcels within each site are of mixed-ownership – both public and private owners.
- › Tier 3A: All parcels within each site are owned by a single private owner.
- › Tier 3: Parcels within each site are privately-owned by multiple owners.

The result is 239 potential opportunity sites across the 13 employment districts and centers. Of those 239, just over 150 are less than 5 acres in size. Only 10 of those sites are entirely publicly-owned and 161 sites are entirely privately-owned. The greatest concentration of opportunity sites is located in predominantly industrial districts - Carondelet, Laclede's Landing, Mark Twain/I-70, Near North Riverfront, North Riverfront, Near Northside, and South Riverfront. In addition, there are significant opportunities to redevelop large, vacant buildings in the city. Many of the largest are located in Downtown including the AT&T building, Railway Exchange and the Jefferson Hotel. These specific opportunities are discussed in the new Downtown plan - Design Downtown STL. In general, building redevelopment must be addressed on a case by case basis to find the best match between the configuration and design of the building with potential tenants seeking that kind of space.

6 Project interviews and roundtables

Opportunity Sites

Source: Interface Studio & Mass Economics

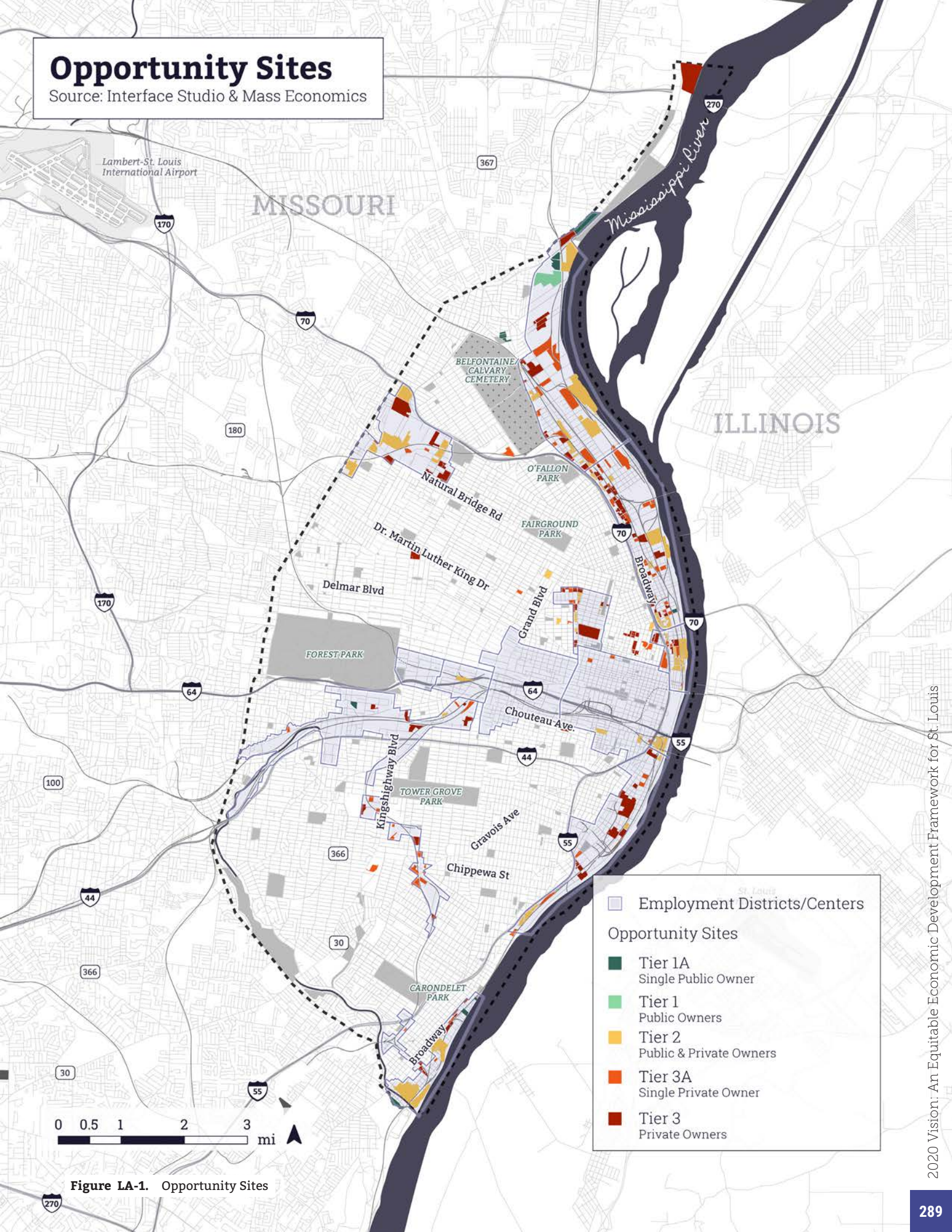


Figure LA-1. Opportunity Sites

Figure LA-2. Opportunity Sites by tier & size

	Parcel Count
Tier 1A	9
Less than 1 acre	1
2 – 5 acres	4
5 – 10 acres	2
10 – 20 acres	1
Greater than 30 acres	1
Tier 1	1
Greater than 30 acres	1
Tier 2	67
Less than 1 acre	5
1 – 2 acres	9
2 – 5 acres	22
5 – 10 acres	16
10 – 20 acres	5
20 – 30 acres	4
Greater than 30 acres	6
Tier 3A	72
Less than 1 acre	9
1 – 2 acres	21
2 – 5 acres	27
5 – 10 acres	8
10 – 20 acres	4
20 – 30 acres	3
Tier 3	90
Less than 1 acre	11
1 – 2 acres	24
2 – 5 acres	21
5 – 10 acres	21
10 – 20 acres	8
20 – 30 acres	1
Greater than 30 acres	4

Source: Interface Studio, Mass Economics

Figure LA-3. Opportunity Sites by size

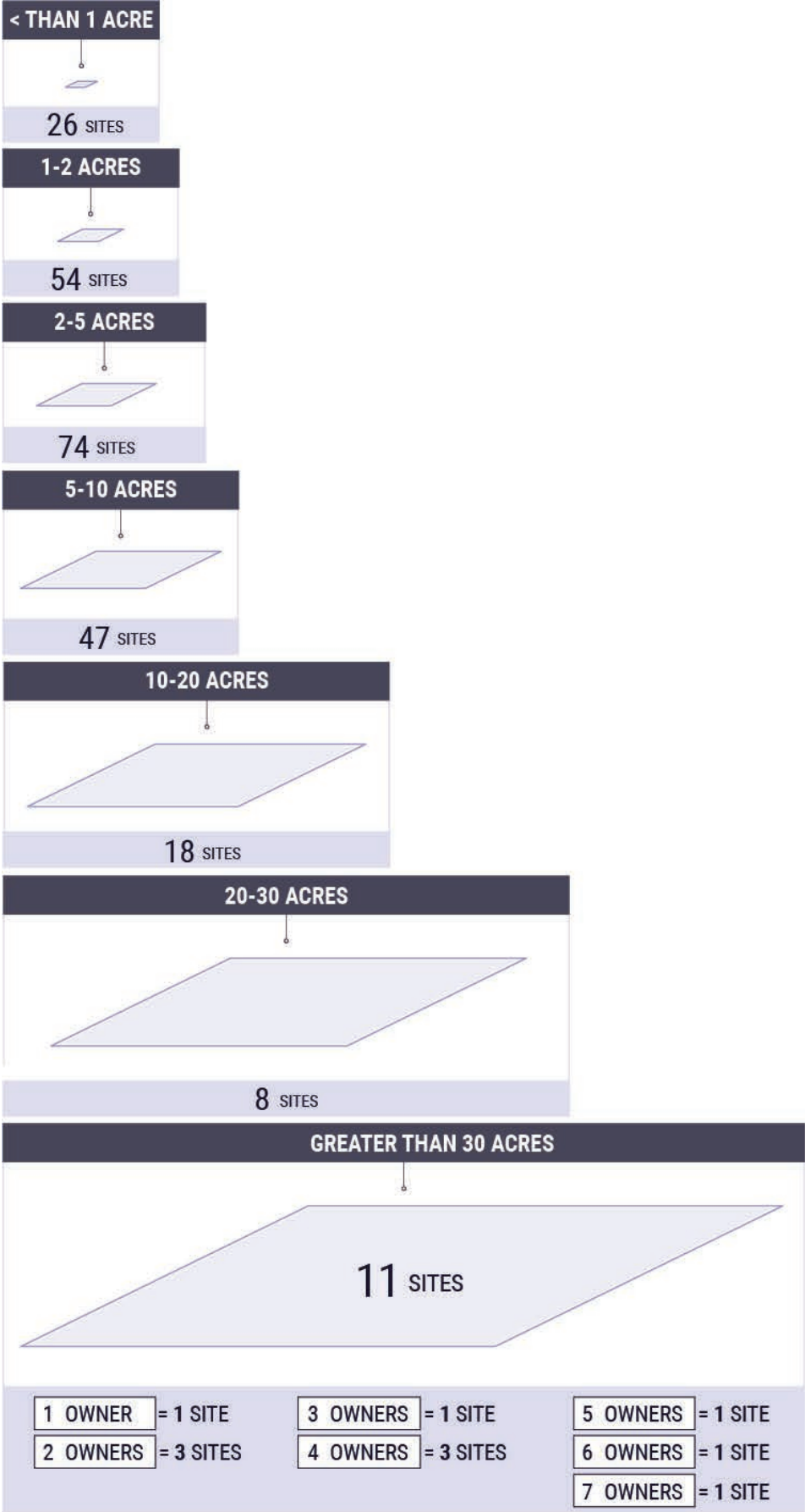


Figure LA-4. Opportunity Sites by tiers, districts/centers, and size

	Less than 1 acre	1 - 2 acres	2- 5 acres	5 - 10 acres	10 - 20 acres	20 - 30 acres	Greater than 30 acres	Total
Tier 1A	1		4	2	1		1	9
Carondelet/Patch	1		1	1				3
Near North Riverfront			1					1
North Riverfront					1		1	2
Outside Districts/Centers			1	1				2
Route 66			1					1
Tier 1							1	1
North Riverfront							1	1
Tier 2	5	9	22	16	5	4	6	67
Carondelet/Patch						1	2	3
Clayton-Sarah				1				1
Downtown			4	3				7
Laclede's Landing	1	2	2	3	1			9
Mark Twain/I-70			1	3	1	2	1	8
Near North Riverfront	1	2	7	3	1	1		15
Near Northside	3	2	2					7
North Riverfront		3	1	2	1		3	10
Outside Districts/Centers			2	1				3
Route 66			1					1
South Riverfront/Kosciusko			2		1			3
Tier 3A	9	21	27	8	4	3		72
Carondelet/Patch	2	2						4
Downtown	1		2					3
Laclede's Landing	2	1	1		1			5
Mark Twain/I-70		1	1					2
Near North Riverfront	1	9	6	1		1		18
Near Northside	1		2					3
North Riverfront			3	2	3	2		10
Outside Districts/Centers		2	3	2				7
Route 66	1	1	1	1				4
South	1	4	5	1				11
South Riverfront/Kosciusko		1	3	1				5
Tier 3	11	24	21	21	8	1	4	90
Carondelet/Patch	1	2	5					8
Laclede's Landing	1	1		2				4
Mark Twain/I-70	1	1	1	3	2		1	9
Near North Riverfront	2	14	6	3	1			26
Near Northside	3	5	3				1	12
North Riverfront	2		2	3	2	1		10
Outside Districts/Centers	1			2	2		1	6
Route 66		1	1	3				5
South			2	1				3
South Riverfront/Kosciusko			1	4	1		1	7

Source: Interface Studio, Mass Economics

Strategies and Action Items

Strategy 1

Maintain a list of critical opportunity sites

The work completed to date to identify possible opportunity sites is an important starting point, but additional research is required to refine this list and take action. Regular management of this data and an annual review and summary is necessary to organize staff time and activities for each year. Already, the Regional Freightway has identified five sites in the city that overlap with the identified opportunity sites.⁷

⁷ Featured Real Estate Sites Map. St. Louis Regional Freightway. <https://www.thefreightway.com/real-estate/>

Action Item #: <u>LA-1.1</u>	Create an annual list of top sites to support the growth of key clusters
Leader	LRA, SLDC
Potential Partners	Port Authority, SLEDP
Start Time	Year 1
Duration	1 year / ongoing
Effort to Implement	Medium
Potential Funding	Economic Development Tax
Goal/s	Database and an annual list of key acquisition activities
Tracking Progress	Annual proposed investments for top opportunity sites

Strategy 2

Create a land assembly fund to acquire and bank land for development

A fundamental hurdle to land assembly is the cost of acquiring and preparing the land for development. There are not dedicated funds for this purpose so dollars need to be identified from existing city budget line items or created through new tools. (This public land assembly fund can be applied to various strategies and action items, e.g. the TDL cluster.) The LRA is empowered to undertake land acquisition, disposition and management for the city but due to funding limitations, LRA's work has been primarily focused on vacant residential property. This is common across cities that face challenges with the scale of vacancy. Land banks typically side-step vacant industrial or commercial property due to the added costs of preparing them

Action Item #: <u>LA-2.1</u>	Convene local leaders to design and capitalize a land assembly fund
Leader	SLDC
Potential Partners	Mayor's Office, Port Authority
Start Time	Year 1
Duration	2 years
Effort to Implement	High
Potential Funding	Patient capital notes, other private capital, earnings from land assemblies and sales
Goal/s	Create market-ready sites for development
Tracking Progress	Total dollars dedicated to capitalize assembly fund

Action Item #: LA-2.2	Expand current vacancy-related activities to address organizational and management plan for prioritizing industrial / commercial land assembly, cleaning title, developing disposition policies and establishing interim maintenance procedures	
Leader	SLDC	
Potential Partners	LRA, Mayor's Office, Planning & Urban Design Agency, Vacancy Collaborative	
Start Time	Year 1	
Duration	2 years	
Effort to Implement	Medium	
Potential Funding	Patient capital notes, other private capital, sales tax	
Goal/s	Enable assembly of commercial and industrial land	
Tracking Progress	Completed organizational plan	
Action Item #: LA-2.3	Establish new sub-agency of SLDC to manage the fund, including board and bylaws	
Leader	SLDC	
Potential Partners	Arch to Park, Board of Aldermen, Invest STL, CDFIs, financial institutions, other philanthropic partners, SLDC Board	
Start Time	Year 2	
Duration	12 months	
Effort to Implement	High	
Potential Funding	Philanthropic and government sources	
Goal/s	Institute and equip the sub-agency to govern the operation of the land assembly fund	
Tracking Progress	Community input on bylaws, support of Mayor's office and Board of Aldermen, inclusions of banking partners to assist in evaluation of fund management	
Action Item #: LA-2.4	Hire a manager to run the fund on a day-to-day basis	
Leader	New sub-agency	
Potential Partners	Financial institutions, philanthropic partners, SLDC	
Start Time	Year 2	
Duration	6 months	
Effort to Implement	Medium	
Potential Funding	Philanthropic and government sources	
Goal/s	Put an experienced, strategic manager in charge of daily operations	
Tracking Progress	Strong list of high-quality candidates; banking and philanthropic partners included in selection process	

for disposition. Cleveland is one of the few cities with a land bank dedicated to industrial and commercial property – the Cleveland Industrial/Commercial Land Bank (ICLB). A dedicated fund and land bank for residential, industrial and commercial property in St. Louis would help to address the immense need around increasing housing density, job density and repurposing industrial land. This includes a critical policy decision regarding whether industrial/commercial land banking should take place as an expansion of LRA with increased level and staff dedicated to this purpose. A capitalized land assembly fund is needed to provide upfront dollars for assembly work, site preparation, and to hold land, where necessary, until property disposition can help to offset costs.

ST. LOUIS JOBS TAKE PLACE IN A DIVERSITY OF PLACES



Cortex in Clayton-Sarah



Faultless at S Riverfront/Kosciusko



Cardinal Machine & Nipple Works, Inc. at 9th & Cass



T-REX on Washington Ave.



Pepsi Warehouse in Mark Twain/I-70



The Schlafly Tap Room on Locust



Commercial Stores at Euclid & McPherson



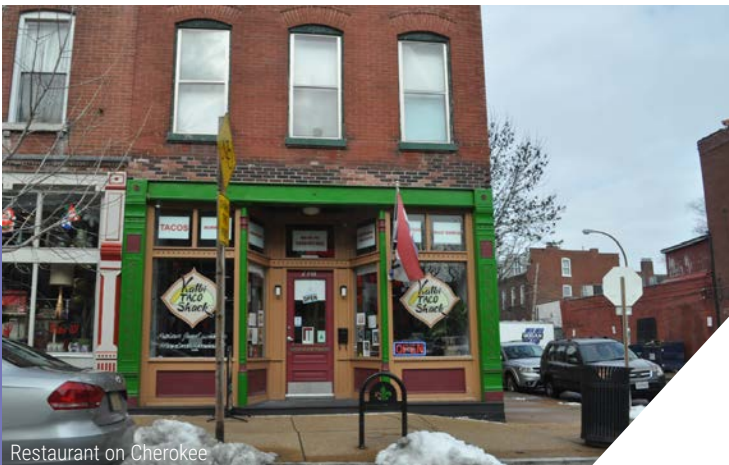
Barnes Jewish Hospital



Commercial Stores at Dr. Martin Luther King & N Kingshighway



Furniture Store on Dr. Martin Luther King



Restaurant on Cherokee



Duke Manufacturing in Near North Riverfront

EMPLOYMENT DISTRICTS

DOWNTOWN CORE & LACLEDE'S LANDING

Overview

The Downtown Core and Laclede's Landing are identified as two separate districts in this work; however, the traditional centerpiece of Laclede's Landing - south of the Casino - is included in the ongoing work of Design Downtown STL, the new plan for Downtown St. Louis. Given that Design Downtown STL is compiling detailed data and strategies for these areas and is not yet complete (estimated in October 2020), these two districts are discussed jointly.

Downtown Core

30% of the land in the Downtown Core is either commercial or mixed-use and the district includes many of the city's well-known assets including the Gateway Arch and the River, Citygarden, the Riverfront, the Convention Center, and the stadiums. With the completion of the St. Louis Aquarium at Union Station and recent commencement of the construction of an MLS stadium, the Downtown Core will remain the centerpiece of the regional economy. About 7% of parcels are entirely vacant but an ongoing challenge for the Downtown Core is the partial vacancy (empty storefronts or office space) that dampen the experience of being Downtown. Both vacant land and buildings are opportunities downtown. Two of the largest buildings in the region - the former AT&T building at 909 Chestnut (1.46 million square feet) and the Railway Exchange building at 615 Olive (1.24 million square feet) - are typically not included in office market summaries for Downtown.⁸

The district (1,570 acres) is currently home to 52,600 private-sector jobs and 12,600 public-sector jobs, which reflects a job density of over 33 private-sector jobs per acre.⁹ Some of the key industries in the Downtown Core

are Business Services, Financial Services, Marketing & Publishing, and Hospitality & Tourism.

Laclede's Landing

13% of the land in Laclede's Landing is used as either commercial or mixed-use. The district has the highest percentage of vacancy (37%) of any employment district or center primarily due to the concentration of empty land and buildings stretching from Lumière Place Casino north to the Stan Musial Veteran's Memorial Bridge. Laclede's Landing has one of the few access points and views of the Mississippi River and recent proposals seek to create a new riverfront park to leverage this unique condition in the City.

The district includes 2,400 employees in 310 acres (about 7.7 jobs per acre) and includes Lumière Place Casino & Hotels. Hospitality & Tourism is by far the largest key industry in the district.¹⁰ There are currently major development plans to expand entertainment uses but also to create significantly more housing.

10 YTS data; QCEW-UDP; Mass Economics Analysis, 2019

District Vision

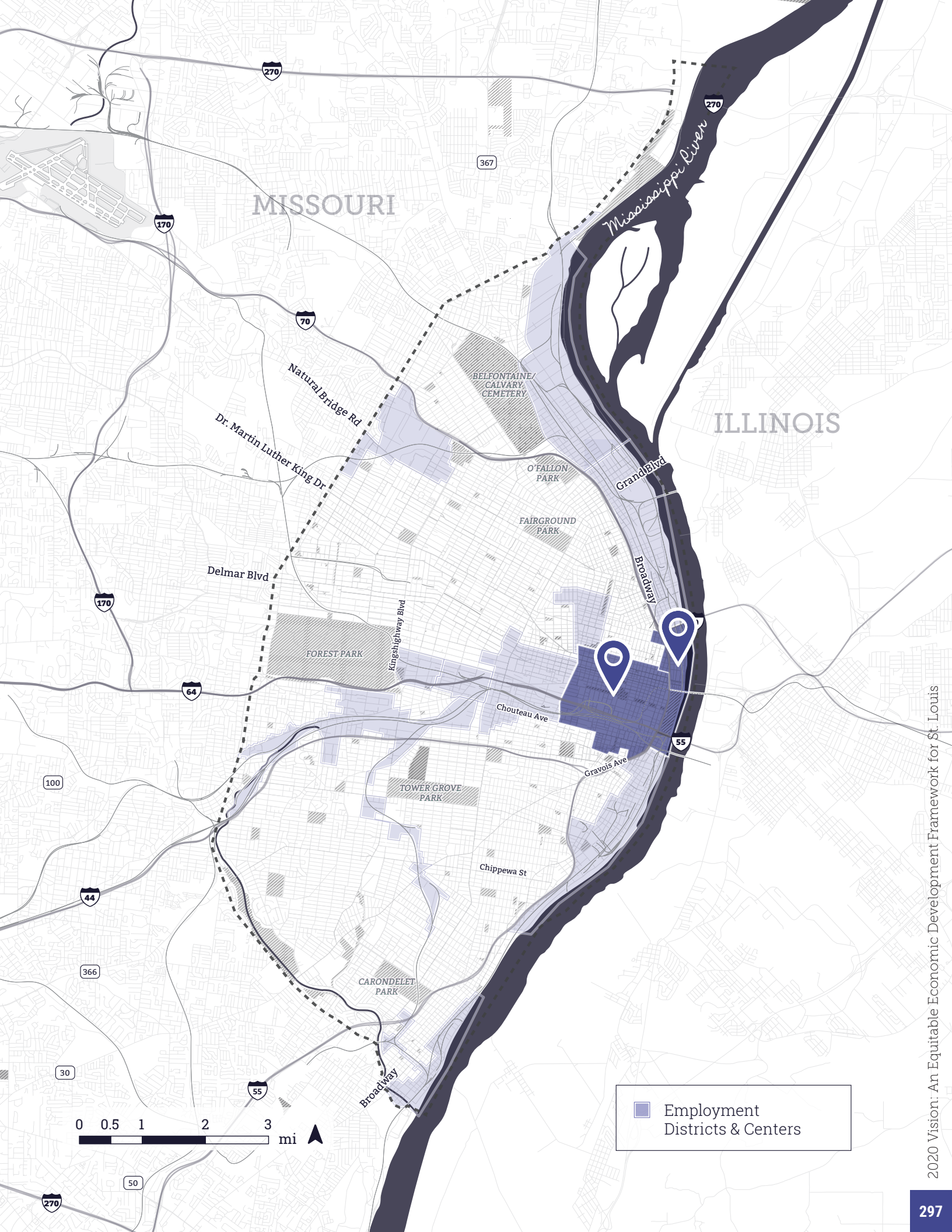
A full, detailed vision will be created for Downtown and Laclede's Landing as a part of Design Downtown STL. As described in the last adopted plan for Downtown which includes Laclede's Landing - Downtown Now - Downtown is an "economic hub and commercial engine," "a cultural and celebratory heart," and; is the "public face for the region."¹¹ The Downtown Now plan recognized that "Downtown St. Louis has the opportunity to be a place where leading edge high technology business occurs"¹² and also emphasizes the need for more housing. This vision remains central to the future of Downtown and Laclede's Landing. New space will serve the growing tech sector including new start-ups related to the NGA headquarters underway just to the north. The area's creative economy will grow around media, design and publishing and new housing will serve to further strengthen Downtown's role as the center for tourism in the region and the State. New development in Laclede's Landing will help achieve housing goals and bring additional attractions and workspaces to serve growing companies.

11 Downtown Now, 1999

12 Downtown Now, 1999

8 St. Louis Business Journal, "St. Louis' largest office buildings"

9 YTS data; QCEW-UDP; LEHD-OTM, 2015 (public-sector job number); Mass Economics Analysis, 2019; note that private employment number includes coworking space/self-employed employment estimates



DOWNTOWN CORE

“I would describe Downtown Core as...”

Abandoned because of the suburban flight.

Awake because it's busy during the day and a little sleepy at night.

Bland because there is a bunch of development that all happened at once. Very generic.

Changing because of the citywide emphasis on economic equity for all.

Critically important because it is the real center and gateway to St. Louis but not doing well today.

Decent. Positive: ease of access. Negative: homelessness, parking challenges.

Empty because Wells Fargo takes up a lot of space. Market Street is too wide, need more restaurants/apartments/density.

Good place to work because there are good lunch spots and it is easy to walk around and commute.

Growing because of the new hotel development, convention center expansion.

Likable because there are a lot of things to do.

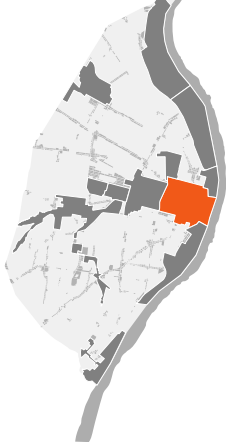
Needing improvement because there are too many homeless on the street.

Room for potential because it could be so much more than what it is now.

Unkept because the city doesn't invest in the street maintenance, crosswalk, lights, trash cans, etc.

Vacant because we are only putting up hotels and tourist attractions.

Source: July Open House public input



District Profile	
Size (acres)	1,570
Employees	52,600
Job Density	33.6
% Industrial (acres)	7%
% Vacant (acres)	7%
Number of Businesses	2,270
Largest Employment Clusters	
Clusters	Employees
Business and Financial Services	17,100
Local Commercial Services	8,200
Tourism	6,900
Local Utilities	3,200
Food and Beverage Manufacturing	2,700
Largest businesses	
Golden Products Corp.	
Nestle Purina Pet Care Co.	
Ameren	
Federal Reserve Bank St. Louis	
Blue Cross Blue Shield	
Noteworthy	
<ul style="list-style-type: none">The district (1,570 acres) is currently home to 52,200 private-sector jobs, which reflects a job density of over 33 jobs per acre. Some of the key industries in the Downtown Core are Business Services, Marketing & Publishing, and Hospitality & Tourism.Downtown has the largest number of jobs out of all employment districts and centers.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio; note that employment number includes coworking space/self-employed employment estimates



Downtown Core

Source: City of St. Louis, Interface Studio



Figure DLL-1. Downtown Core aerial map

LACLEDE'S LANDING

District Profile	
Size (acres)	310
Employees	2,400
Job Density	7.7
% Industrial (acres)	8%
% Vacant (acres)	37%
Number of Businesses	110
Largest Employment Clusters	
Clusters	Employees
Tourism	1,400
Marketing, Design, and Publishing	300
Food and Beverage Manufacturing	260
Business and Financial Services	100
Automotive and Motor Vehicle Services	80
Largest Businesses	
Lumière Place Casino & Hotels	
Four Seasons Hotel St. Louis	
Abstrakt Marketing Group	
Bissinger Karl Inc.	
Old Spaghetti Factory	
Noteworthy	
<ul style="list-style-type: none">• 60% of jobs are with Lumière Place Casino and Hotels• About 50% of parcels and 40% of the acres in Laclede's Landing are currently vacant - the majority of this vacancy is north of the casino	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio

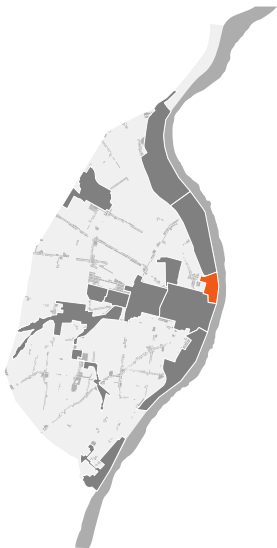




Figure DLL-2. Laclede's Landing aerial map

Note, as described above, a current planning process called Design Downtown STL is underway that covers Downtown and Laclede's Landing. Some of the suggested strategies and action items below may need to be adjusted and adapted as the Design Downtown STL Plan is finalized.

Strategies and Action Items

Strategy
1

Grow the level of private sector jobs Downtown

Downtown is a major employment center consisting of a wide range of private and public-sector jobs that represent over a third of all jobs in St. Louis. However, private-sector job growth lags behind other cities. Downtown has been suffering net job loss and shrinking square footage per employee, resulting in the high commercial office vacancy rate of 20% as of the end of 2019.¹³ This vacancy rate does not include the two entirely vacant structures – the AT&T tower and Railway Exchange – which together account for over 2 million square feet of empty space. However, while Downtown has struggled to land major corporate tenants in recent years, there is significant momentum Downtown in terms of recent investment and new amenities. There is nowhere else in the country where one is in close proximity to four different professional sports teams, an aquarium, a casino and a major convention center and still able to actually afford commercial space. The opportunity is to encourage the reuse of empty commercial space for start-ups, T-REX graduates, NGA spin-off enterprises, entrepreneurs, makers and designers. To expand job growth, there needs to be an expanded range of economic activities to provide inclusive opportunities for a wide-range of backgrounds, skills and business models.

Action Item #: <u>DLL-1.1</u>	Work with the Design Downtown STL planning process to create a program to expand economic activity Downtown and reduce the commercial vacancy rate
Leader	SLDC, Downtown STL
Potential Partners	City
Start Time	Ongoing
Duration	6 months
Effort to Implement	High
Potential Funding	Building owners, developers, philanthropic sources
Goal/s	New jobs in a wide range of industries
Tracking Progress	Occupancy permits, Vacancy data



One of Downtown's big empty ground floor spaces

¹³ Cushman and Wakefield, Market Beat: St. Louis Office Q4 2019

**Strategy
2**

Promote new retail and services in targeted areas in accordance with Design Downtown STL

Retail best succeeds when concentrated with other retail and restaurants. In the early 2000s, Washington Avenue experienced a resurgence in retail and restaurant activity along with new housing. This complemented restaurants in Laclede's Landing. Today, there is also Ballpark Village, Union Station, a proposed Innovation District and an MLS Stadium being constructed. It is important to clearly identify where retail should be concentrated in Downtown and Laclede's Landing as there is a limit, even with new housing and tourism activity, to how much ground floor retail can be supported. For reference, Downtown Atlanta which has significantly more jobs and more residents, supports only a handful of retail corridors. Zoning changes will be outlined in Design Downtown STL as well as potential incentives to concentrate retail in designated areas and along identified corridors.

Action Item #: <u>DLL-2.1</u>	Align policy and incentives to target retail development and support
Leader	Downtown STL
Potential Partners	Planning & Urban Design Agency, Zoning, SLDC
Start Time	Ongoing
Duration	1 year
Effort to Implement	Medium
Potential Funding	TBD
Goal/s	Concentrated retail development
Tracking Progress	Occupancy permits, number of new retail establishments



Occupied, vacant, and under-construction storefronts along Washington Ave.

Strategy 3

Reuse ground floor commercial space for small business development and the creative sector

Given the limits and difficulty to developing retail, there remains an open question on how best to activate the large amount of first floors of mixed-use buildings. For small businesses, start-ups and those in the creative sector that are price sensitive, Downtown is a natural draw. To ensure Downtown remains home to a growing and vibrant creative and tech sector, there needs to be flexible, inexpensive spaces for business to start and grow into. SLDC and their partners should consider a program to assist with the conversion and leasing of ground floor spaces in existing and new buildings. Master leases can be an effective tool to help developers and private property owners fill these spaces and, in the case of new development, provide a credit-worthy option that banks are more likely to finance than a small, as yet unproven, start-up.

Action Item #: <u>DLL-3.1</u>	Research and develop a master lease and ground floor activation program
Leader	SLDC, Downtown STL
Potential Partners	Property owners
Start Time	Year 1
Duration	1 year
Effort to Implement	High
Potential Funding	Building owners, developers, philanthropic sources
Goal/s	Creative, inexpensive space for small businesses and start-ups
Tracking Progress	Occupancy permits, number of new retail establishments



Ground floor space along 1300 Washington Ave.

Strategy 4

Promote the integration of new residential growth in Downtown and Laclede's Landing to support economic activity

Tourism is central to Downtown's economy. With new attractions at Union Station and the proposed MLS Stadium, this role is only strengthening. However, what holds tourism back is not the attractions or level of commitment and investment key partners have made in Downtown but the overall lack of pedestrian and street activity. The lack of people on the streets fuels negative perceptions around safety and impacts not just the tourism industry but also all other Downtown businesses. Housing in Downtown and Laclede's Landing is critical to realizing economic goals in these districts but also for the city. New housing will add foot traffic, increase demand for retail and services and help to fully realize the vision of Downtown as a neighborhood. Further, a true Downtown neighborhood will help to further attract and retain tourists and support additional uses that serve tourists and residents alike including restaurants and stores.

Action Item #: <u>DLL-4.1</u>	Build upon the existing financial incentive model to identify conditions under which tax incentives or other direct investment approaches could be utilized to stimulate new housing development
Leader	SLDC
Potential Partners	Planning & Urban Design Agency
Start Time	Year 1
Duration	6 months
Effort to Implement	Medium
Potential Funding	N/A
Goal/s	Clarity of intent and communication with potential investors and the public
Tracking Progress	Number of new construction permits, number of residents/households



Downtown's historic loft buildings that have been rehabbed into apartments

Action Item #: <u>DLL-4.2</u>	Through Design Downtown STL, identify the top three to five investments that would enhance the quality of living Downtown/Laclede's Landing
Leader	Downtown STL
Potential Partners	SLDC
Start Time	Year 1
Duration	3 months
Effort to Implement	Medium
Potential Funding	Downtown STL
Goal/s	Identify investment priorities needed to grow resident population
Tracking Progress	Resident population, recent investment/project list
Action Item #: <u>DLL-4.3</u>	In collaboration with local partners, identify funding and implement investments identified in previous step
Leader	SLDC
Potential Partners	Community Builders Network, Downtown STL
Start Time	Year 2
Duration	12-18 months
Effort to Implement	High
Potential Funding	Municipal, Community Improvement District or TIF revenues
Goal/s	Expanded housing for a range of incomes
Tracking Progress	New construction building permits, number of new residential units, percent of units below market rate

**Strategy
5**
Further enhance connections between Downtown and Laclede's Landing and expand marketing efforts

Although a lot of investment has been made to connect the two districts, there remains significant real and perceived barriers that divide these two districts. The highway overpasses and design of the street-level experience need to be enhanced to better support a free flow of people. This area within Downtown needs to manage traffic exiting the highway but there must be a balance to ensure that investments and improvements in one location are not isolated from the other. There are notable and recent improvements to the underpasses in past years. These investments set the stage for taking the next step to improve this important connection.

Following years of being disconnected from the rest of the City, in part due to the Arch Grounds Redevelopment, Laclede's Landing has suffered. Cruising and concerns over crime are a critical issue for the local businesses and stakeholders seeking to revive the district, and the challenges must be taken on at the outset.

There is opportunity to take advantage of the proximity to the Arch, and the Lumière Casino to create a tourism strategy, combined with a mixed-use development strategy that will bring more activity to the streets. By strengthening local partnerships with developers, stakeholders and other investors, such as Downtown STL and Lumière Place, the city can reinvigorate this area by coordinating on reducing cruising activities, enhancing marketing and branding and organizing ongoing tours from the Arch to Laclede's Landing to draw in more tourists to the area.

Action Item #: <u>DLL-5.1</u>	Convene local leaders to develop a marketing campaign for Laclede's Landing
Leader	Downtown STL
Potential Partners	Abstrakt Marketing, Convention Center, Laclede's Landing CID, Laclede's Landing Redevelopment Corporation, Lumière Place, developers
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	In-kind services, Downtown STL
Goal/s	Reignite and expand Laclede's brand
Tracking Progress	Occupancy permits, new construction permits
Action Item #: <u>DLL-5.2</u>	Design and implement critical underpass enhancements to build upon recent investments to improve pedestrian and bicycle connectivity with Downtown
Leader	Downtown STL
Potential Partners	Convention Center, Laclede's Landing CID, Laclede's Landing Redevelopment Corporation, Mayor's Office, MODOT, developers
Start Time	Year 1
Duration	3-5 years
Effort to Implement	High
Potential Funding	Downtown STL, private donations
Goal/s	Create a visible, safe link between Downtown and Laclede's Landing for pedestrians and cyclists in addition to the existing tunnel connection
Tracking Progress	Change in bicycle and pedestrian counts

THERE IS OPPORTUNITY TO TAKE ADVANTAGE OF THE PROXIMITY TO THE ARCH, AND THE LUMIÈRE CASINO TO CREATE A TOURISM STRATEGY, COMBINED WITH A MIXED-USE DEVELOPMENT STRATEGY THAT WILL BRING MORE ACTIVITY TO THE STREETS.



Pedestrians walking in front The Lou at Laclede's Landing



Highway underpass near Dr. M.L.K Dr. & 4th Street

Strategy 6

Evaluate new industrial mixed-use and flex space districts in Laclede's Landing

There are major plans on the boards for Laclede's Landing stretching from the Eads Bridge north to the Stan Musial Veterans Memorial Bridge. Over the years there have been multiple plans to redevelop this area including the large amounts of vacant property north of the Casino. The current proposal includes a significant number of new units south of Lumière Place to complement those already brought online in recent years. Proposals for the area north of the Casino has consistently focused on a mix of housing, entertainment and offices. However, this is one of the few locations in the city where businesses could scale up with the right space in place. Without business migration space, small and start-up businesses, including local manufacturers, may find it difficult to find the right space to grow into. North of the casino-owned property is an excellent opportunity to develop new mixed-use commercial typologies that mix office with light industrial uses. These flex building products offer different spaces to accommodate a wide range of activity from design to prototyping to production. Reuse of this area in this way reflects its legacy as a center for industrial and commercial jobs.

Action Item #: <u>DLL-6.1</u>	Support planning for Laclede's Landing and promote new commercial and light industrial products to support business migration space and potential maker space
Leader	SLDC
Potential Partners	Downtown STL, Laclede's Landing CID, Laclede's Landing Redevelopment Corporation, Lumière Place, private developers
Start Time	Year 1
Duration	3-5 years
Effort to Implement	High
Potential Funding	Internal, private dollars
Goal/s	Development of migration space for growing businesses
Tracking Progress	Total sq. ft. of new office / industrial space, number of employees, number of district businesses



Riverfront area under Martin Luther King Bridge in Laclede's Landing

EMPLOYMENT DISTRICT *NEAR NORTHSIDE*

THE N2W HEADQUARTERS
ITSELF WILL BE ONE OF THE
COUNTRY'S MAJOR ASSETS
FOR GEOSPATIAL JOBS.

Overview

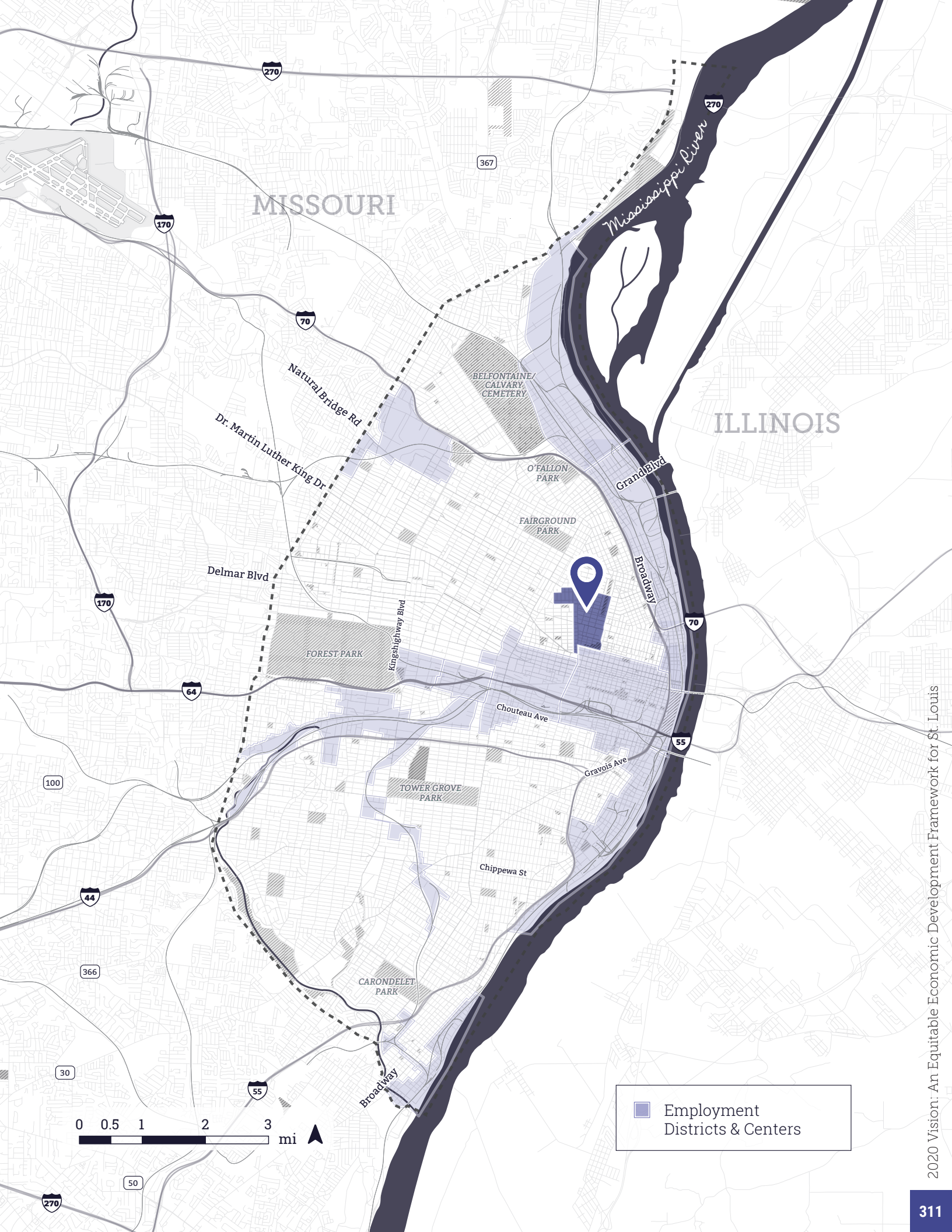
The Near Northside is an employment district, where the NGA (National Geospatial-Intelligence Agency) West Headquarter (N2W) is under construction. Currently, the district is mostly vacant (28%) including residential neighborhoods, such as JeffVanderLou, St. Louis Place, Old North St. Louis, and Carr Square.

The Near Northside district is a 350-acre site that includes the proposed NGA site, a pharmaceutical company, and nearby schools. Although the district is not a current employment hub, the NGA West is expected to house more than 3,000 permanent jobs and support 1,100 construction jobs.¹⁴

¹⁴ Construction. (n.d.). Next NGA West. <https://www.nextngawest.com/#/about/construction>

District Vision

The next phase of the development of the Near Northside will be driven by the development of the N2W headquarters which will infuse North St. Louis with thousands of jobs. The N2W headquarters itself will be one of the country's major assets for geospatial jobs. With the investment, the district will expand with new housing to the north and east and a mix of new commercial and institutional uses along Jefferson Avenue. New transit and the Greenway will serve to link this investment with Downtown, Midtown and surrounding communities. NGA's new approach to innovation will increase its engagement with private sector firms, establishing St. Louis as a growing center for geospatial and technology jobs. Innovation activity in this district will also leverage nearby industrial land for particular cluster applications (e.g., TDL).



■ Employment Districts & Centers

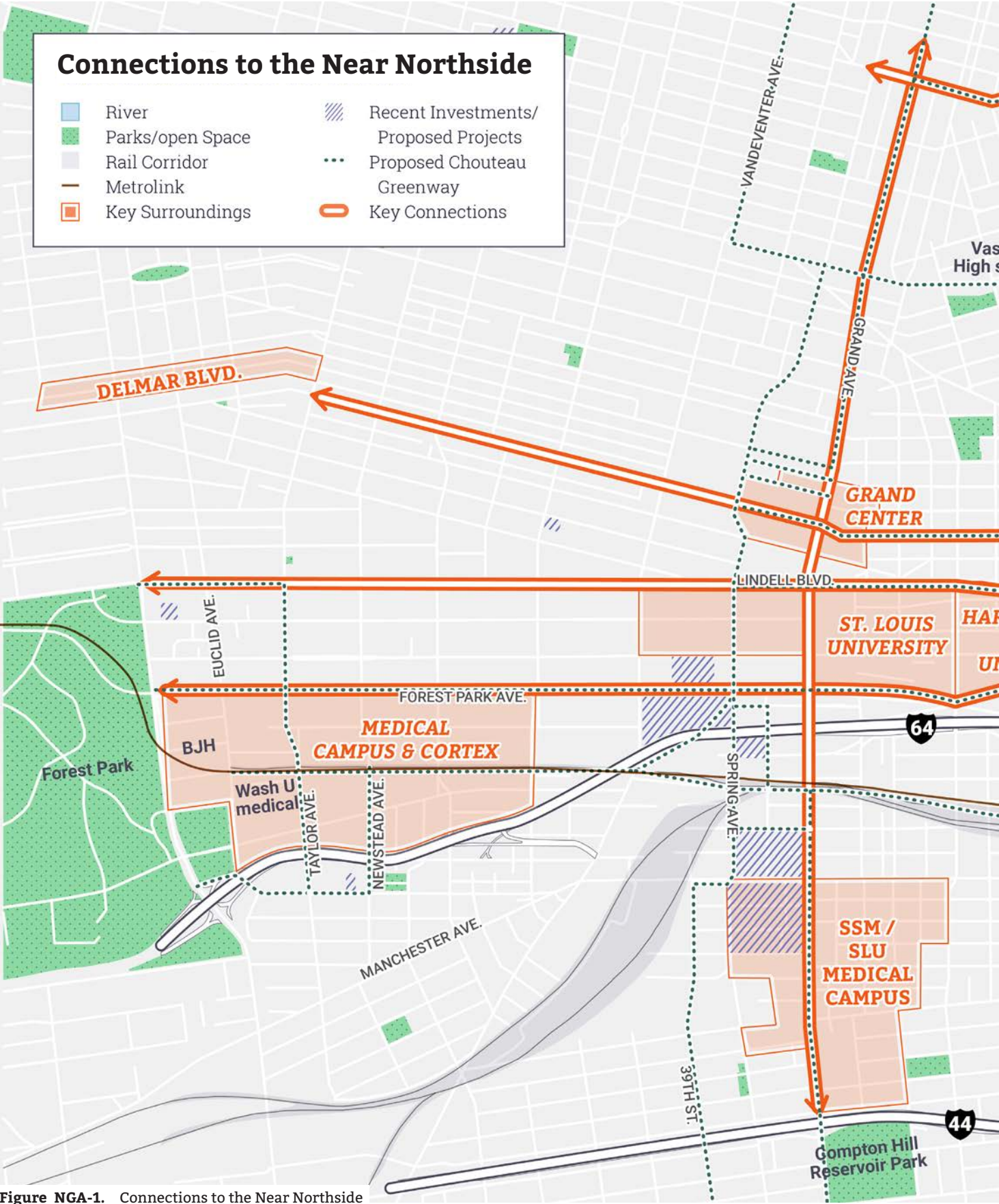
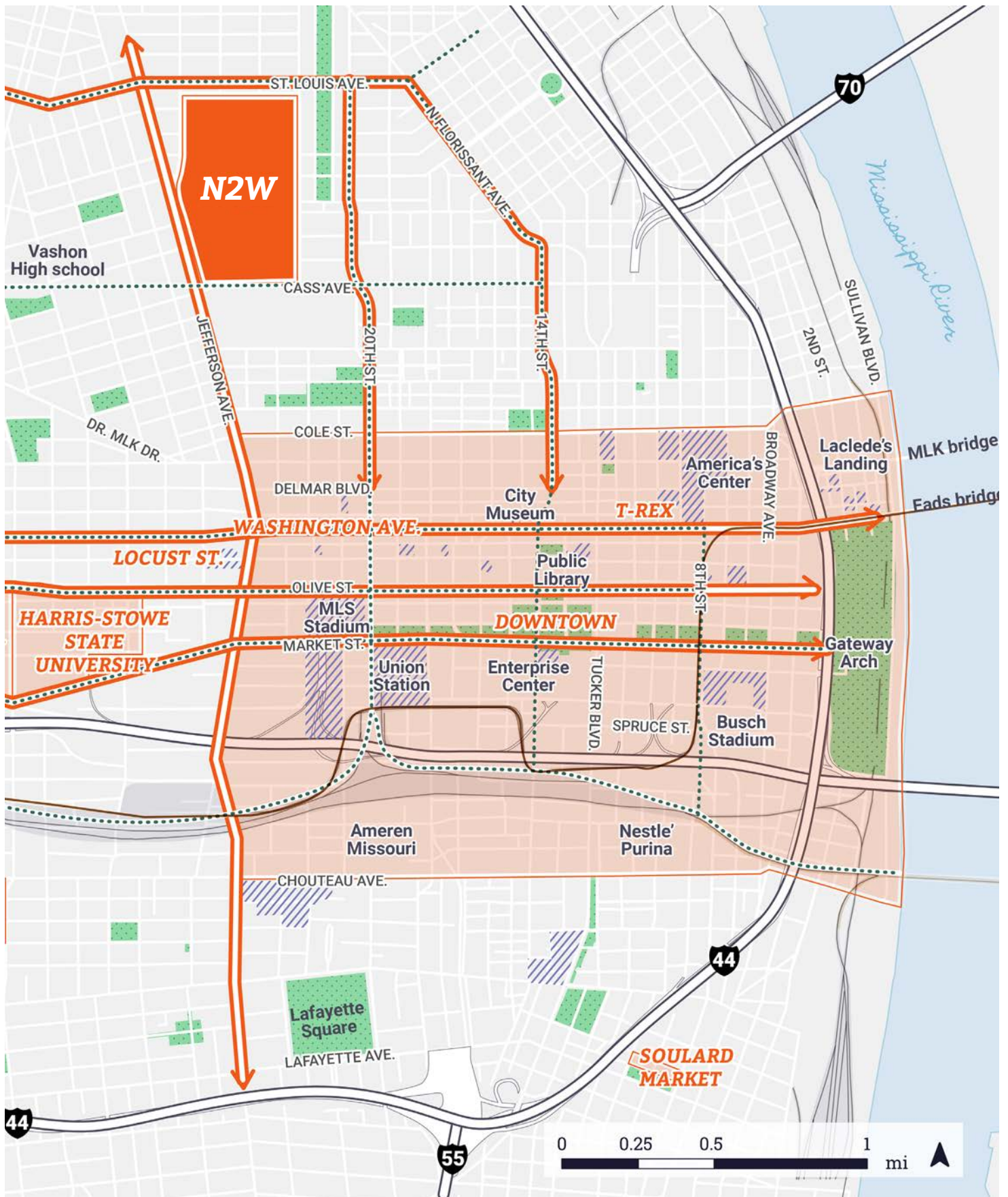


Figure NGA-1. Connections to the Near Northside



NEAR NORTHSIDE

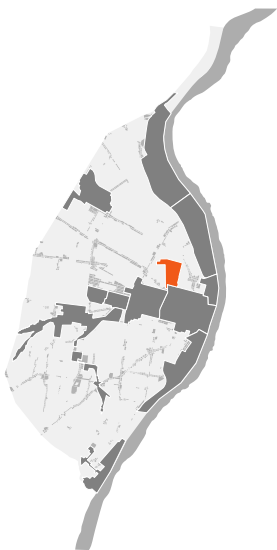
“I would describe the Near Northside as...”

Barren because of the vacant lots, derelict buildings, overgrown weeds and jungle (Pruitt-Igoe), no life or energy.
Industrial because several homes and people were displaced.

Source: July Open House public input

District Profile	
Size (acres)	350
Employees	800
Job Density	2.3
% Industrial (acres)	11%
% Vacant (acres)	28%
Number of Businesses	50
Largest Employment Clusters	
Clusters	Employees
Chemicals and Metals	500
Local Community and Civic Organizations	50
Local Retailing of Clothing and General Merchandise	40
Vulcanized and Fired Materials	30
Local Education and Training	30
Largest Businesses	
Sensient Colors Inc.	
Faultless Healthcare Linen	
Connector Castings Inc.	
Ed Roehr Safety Products	
Trojan Iron Works	
Noteworthy	
<ul style="list-style-type: none">Although the district is not a current employment hub, the NGA West is expected to house more than 3,000 permanent jobs and support 1,100 construction jobs.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



Source: St. Louis Post Dispatch

Near Northside

Source: City of St. Louis, Interface Studio



Figure NGA-2. The Near Northside aerial map

Note: Some of the buildings shown on this aerial map have been removed/relocated for the new N2W campus.

Strategies and Action Items

Strategy 1

Develop space to support tech and NGA start-ups

Entrepreneurs in geospatial and tech seeking better utilization of NGA data will require land uses, space, and support to develop and expand their businesses. Currently, T-REX provides support, networking and coworking space for start-ups and is an important resource, in expanding a geospatial cluster in St. Louis. However, maximizing the economic impact of the new NGA site will require creating at least some of the characteristics associated with innovation and tech districts globally—24/7 activity, non-office places for work meetings, and socialization, and low-cost space for start-ups and second-stage firms.¹⁵ Building this kind of an environment in the Near Northside district around the NGA headquarters will be extremely difficult. There is significant vacant land but currently a dearth of the types of amenities and services that Downtown already offers. Recent studies around NGA potential spin-off activities includes a potential market support for 100,000-120,000 square feet of office space.¹⁶ This space, as well as future software tech space is best suited to north of Washington Avenue in Downtown between Jefferson Avenue and T-REX. This location offers development opportunities but also amenities nearby. Development here will help to reinforce recent investment on Tucker Blvd. for Square and other tech and innovation companies.

In addition to new development, there are opportunities to reuse empty ground floor spaces in existing buildings along and near to Washington Avenue in Downtown for software tech and geospatial businesses. A program, as described in the section about Downtown, to activate and “master lease” empty space would help to provide the physical infrastructure for new and growing start-ups.

Action Item #: <u>NGA-1.1</u>	Identify potential development parcels to support NGA activities
Leader	SLDC
Potential Partners	NGA, private developers
Start Time	Year 1
Duration	2 years
Effort to Implement	Medium
Potential Funding	Internal
Goal/s	Development plan to support the growth of the geospatial cluster in Downtown
Tracking Progress	Total amount of space for start-ups, number of new businesses, number of employees connected to NGA
Action Item #: <u>NGA-1.2</u>	Champion the NGA area for initial build out of the Greenway
Leader	Great Rivers Greenway, SLDC
Potential Partners	NGA, Planning & Urban Design Agency, neighborhood leadership
Start Time	Year 1
Duration	1 year / ongoing
Effort to Implement	Medium
Potential Funding	Philanthropy, capital campaign
Goal/s	Align the Greenway with investment in the Near Northside district for N2W and N2W-related companies of all sizes
Tracking Progress	The Greenway's final alignment and design

¹⁵ Katz and Wagner; project interviews and roundtables

¹⁶ Project interviews and roundtables

Strategy 2

Create strong connections between NGA, nearby neighborhoods and Downtown

As a federal facility with high security precautions, the N2W headquarters is designed as a self-contained campus. While necessary to ensure compliance with federal requirements, strong connections to nearby neighborhoods and employment districts are necessary. Such connections should build on existing efforts, including the Missouri Department of Transportation's off-site improvements along 20th and 22nd and the north-south MetroLink expansion, incorporate the findings from the Metro TOD study, and support and grow the Project Connect effort on transportation and neighborhood development in the surrounding Near Northside district. The potential Greenway alignments along St. Louis Ave. will help to integrate N2W into a larger network of connections. Jefferson Avenue is a critical opportunity to connect with the central core and is already proposed for street improvements and future transit service. In addition, clear connections along 20th Street and 14th Street (from Florissant) are also necessary to provide clear connections to Downtown. These connections should include bike lanes and clear wayfinding but bus rapid transit or a shuttle should also be considered that provides regular connections between NGA, Downtown and Cortex.



Northwest view of NGA Headquarter rendering, released in February 2020

Source: McCarthy HITT via <https://nextngawest.com/>

Action Item #: <u>NGA-2.1</u>	Seek funds to improve Jefferson Avenue, 20th and 14th Streets
Leader	Board of Public Service, Great Rivers Greenway, SLDC
Potential Partners	Planning & Urban Design Agency
Start Time	Ongoing
Duration	1 year / ongoing
Effort to Implement	Medium
Potential Funding	BUILD Program, private fundraising
Goal/s	Strong, physical connections between NGA/N2W and Downtown
Tracking Progress	Great Rivers Greenway project updates including Brickline Greenway alignments
Action Item #: <u>NGA-2.2</u>	Support continued land use planning around the NGA/ N2W headquarters
Leader	Project Connect
Potential Partners	GeoFutures, Planning & Urban Design Agency, SLDC
Start Time	Ongoing
Duration	1 year / ongoing
Effort to Implement	Low
Potential Funding	Economic Development Tax
Goal/s	A neighborhood of integrated support for the residents and commercial activities surrounding the NGA/N2W headquarters
Tracking Progress	Total investment in surrounding communities

Strategy 3 Encourage new housing infill development

The neighborhoods in the Near Northside district and surrounding the NGA – JeffVanderLou, Old North, Carr Square and St. Louis Place – experienced greater population percentage loss than any other area of St. Louis between 1950 and 2017.¹⁷ The result is significant vacancy but also hope for the future through ongoing work by local non-profits. For instance, Old North has seen robust population growth (28% from 2000 to 2010), which is an opportunity to build upon. Besides the NGA, a Choice Planning grant was completed to seek funds to transform public housing in the community. Given this recent interest and planning work, when possible, infill housing and community improvements should be concentrated in St. Louis Place east of NGA and the other neighborhoods surrounding the NGA. This is an important opportunity to grow housing and local, equitable jobs around the city-building cluster. City-building presents a special opportunity for local, St. Louis-based firms that have the knowledge, networks, and dexterity to respond to the range of needs in the community and, to train and employ local residents in the skills necessary to improve their community.

As with potential infill development in JeffVanderLou, improvements should be identified and completed with local residents that have already helped to create the Project Connect Action Plan in 2017. This is an ideal location to focus rollout of tools like the greenlining fund spearheaded by Justine Petersen, Metropolitan St. Louis Equal Housing and Opportunity Council and SLDC. A local CDC with the capacity to guide this investment with residents is necessary to fully maximize the potential around NGA.

Action Item #: <u>NGA-3.1</u>	Identify arrangements to help fund dedicated investment by a local community development corporation for the community
Leader	SLDC
Potential Partners	GeoFutures, Justine Petersen, Metropolitan St. Louis Equal Housing and Opportunity Council, Planning & Urban Design Agency, SLEDP, St. Louis Promise Zone
Start Time	Year 1
Duration	3-5 years
Effort to Implement	High
Potential Funding	Philanthropic sources
Goal/s	Create a dedicated funding source to enhance community capacity
Tracking Progress	Amount of new investment, number of new housing units

REFERENCE

PROJECT CONNECT ACTION PLAN, 2017

St. Louis, MO



https://www.stlouis-mo.gov/government/departments/sldc/project-connect/upload/ActionPlan_FINAL_Printable-3.pdf



¹⁷ O'Dea, J. (2019, November 4). Small church steps up to help rebuild a broken north St. Louis neighborhood. St. Louis Post-Dispatch. https://www.stltoday.com/news/local/metro/small-church-steps-up-to-help-rebuild-a-broken-north/article_409db978-bfcb-5768-b355-c151a2143da4.html

Action Item #: NGA-3.2	Identify key development sites and housing resources to support new and rehabilitated housing
Leader	LRA in partnership with Project Connect
Potential Partners	GeoFutures, Justine Petersen, Metropolitan St. Louis Equal Housing and Opportunity Council, Planning & Urban Design Agency, SLEDP, St. Louis Promise Zone, SLDC
Start Time	Ongoing
Duration	3-5 years
Effort to Implement	High
Potential Funding	Economic Development Tax
Goal/s	Community reinvestment plan around NGA
Tracking Progress	Amount of new investment, number of new housing units

Figure NGA-3. Top 10 neighborhoods for population loss, 1950 - 2017

Neighborhood	Population Loss
▶ JeffVanderLou	-35,540
Central West End	-25,014
▶ St. Louis Place	-20,083
Near North Riverfront	-18,919
Greater Ville	-17,700
Wells Goodfellow	-17,163
Midtown	-17,090
West End	-15,594
Soulard	-15,071
▶ Carr Square	-14,088

▶ = neighborhoods adjacent to NGA

These neighborhoods in St. Louis lost the most total population relative to other neighborhoods in the city between 1950 and 2017, according to new research from Christopher Prener, assistant professor of sociology at St. Louis University.

Source: O'Dea, J. (2019, November 4). Small church steps up to help rebuild a broken north St. Louis neighborhood. St. Louis Post-Dispatch



Vacant houses and lots in JeffVanderLou neighborhood

Strategy
4

Plan for institutional and commercial uses along Jefferson Avenue

One of the primary frontage streets for NGA is Jefferson Avenue that links the site with Downtown and Midtown to the South. The street itself is earmarked for improvements and potential future transit service. The land uses along Jefferson are primarily vacant. Just to the west of Jefferson north of Market Street is Sensient Colors and a handful of commercial and industrial businesses. These existing businesses, along with NGA, help to establish this area as a new employment district. To reinforce the existing businesses, vacancy along Jefferson is an opportunity for future commercial and small-scale industrial businesses as well as institutional offices and services particularly south of Cass between the Fire Department and concentration of public schools including Carr Lane Middle School and La Salle Middle School. These uses will provide potential job opportunities for nearby residents but any small-scale industrial businesses must be low-impact uses to ensure they are good neighbors to the JeffVanderLou community.

Action Item #: <u>NGA-4.1</u>	Acquire land for future development and establish clear expectations for density and land uses
Leader	SLDC
Potential Partners	Planning & Urban Design Agency
Start Time	Ongoing
Duration	3-5 years
Effort to Implement	High
Potential Funding	Land Assembly Fund
Goal/s	New employment opportunities and businesses along Jefferson Avenue
Tracking Progress	Amount of new investment, number of new businesses on Jefferson Avenue



Sensient Colors



Jefferson Ave. looking south to the NGA West campus construction site on the left

**Strategy
5**

Continue to promote the reuse of Pruitt-Igoe for jobs-intensive development

A proposal has been in place to redevelop Pruitt Igoe for a hospital. A broader range of employment activities is also being considered that support the continued growth of the city's core clusters.

Action Item #: <u>NGA-5.1</u>	Support continued development for the future of Pruitt-Igoe
Leader	Private developer
Potential Partners	City, SLDC
Start Time	Ongoing
Duration	3-5 years
Effort to Implement	High
Potential Funding	N/A
Goal/s	Reuse of Pruitt Igoe site for quality jobs
Tracking Progress	Redevelopment activity, total investment



Pruitt-Igoe site before demolition

Source: <https://www.governing.com/topics/mgmt/gov-pruitt-igoe-st-louis-redevelopment.html>



Existing Pruitt-Igoe site

Source: Google Map Aerial, February 28 2020

Near Northside Potential Strategy

Source: Interface Studio, Mass Economics

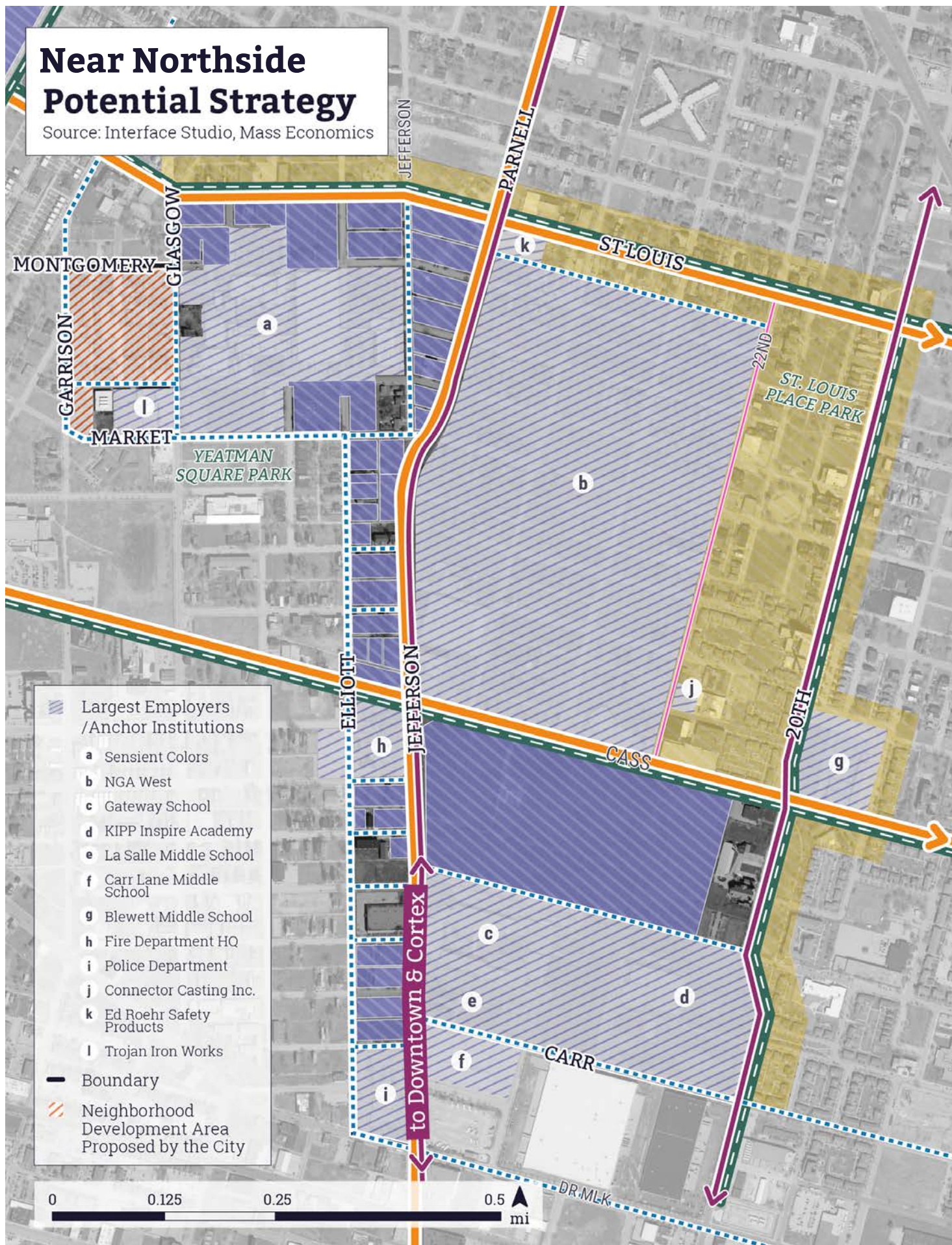
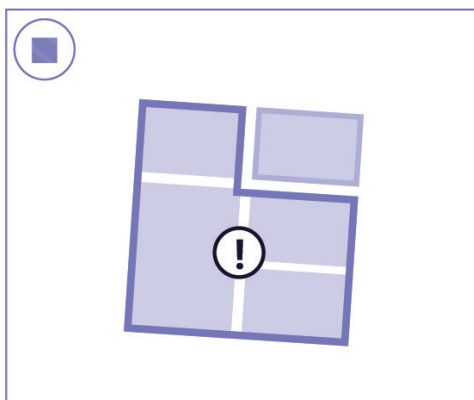


Figure NGA-4. Near Northside potential strategy



Potential Opportunity & Investment

Assemble land for potential development on a collection of multiple parcels that are currently vacant and/or underutilized.



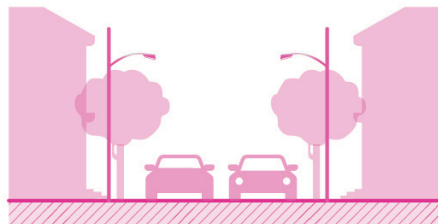
Front Door

Front Door functions as main entrance to a district. Potential improvements include lighting, wayfinding, streetscape, façade improvements, landscaping and street surface upgrades.



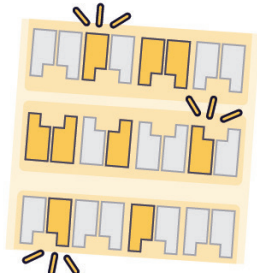
Access Street

Access Streets are intended to serve the needs of existing and new businesses and designed to accommodate truck access.



Neighborhood Connector

Designed to establish clear connections between employment districts and adjacent neighborhoods. Potential improvements include wayfinding and landscaping.



Neighborhood Stabilization/Investment

Rehabilitate structures and plan for infill development where possible to leverage nearby investment.



Trail/Bike Path (e.g. Brickline Greenway)

Provide pedestrian and/or bike-friendly infrastructure. These corridors serve as a part of Great Rivers Greenway trail network and includes the proposed Brickline Greenway alignment.



Multi-modal (e.g. MetroLink Expansion)

Multi-modal streets are designed to support multi-modal transportation and transit.

Figure NGA-5. Proposed improvements for the Near Northside

SUPPORTING DISTRICTS

CENTRAL WEST END, MIDTOWN, CLAYTON-SARAH

Overview

The central corridor of St. Louis is critical to the city's economic present and future. The Downtown Core, the Central West End, Midtown and Clayton-Sarah account for a majority of city jobs. In the case of Central West End, Clayton-Sarah and Midtown, recent job growth and development are a product of focused investments and careful planning coupled with significant institutional backing. SLDC's role in these districts is one of support as there are many organizations and individuals actively engaged in planning and development. Due to the on-the-ground capacity and leadership, these three districts are discussed collectively.

Central West End

The Central West End is often referred to as the medical campus of the city. 74% of the parcels in this employment district are institutional, primarily hospitals and medical uses associated with Washington University in St. Louis and Barnes Jewish Hospital/BJC HealthCare System. There is no industrial land in the district it is almost entirely occupied with a vacancy rate of 2%.

Central West End is 240 acres and holds 28,300 employees, which amounts to 120 jobs per acre.¹⁸ Central West End district has the highest job density compared to all the other employment districts and centers in the City. In addition to jobs in healthcare, the district includes additional jobs related to Education and Training and Hospitality and Tourism.

¹⁸ YTS data; QCEW-UDP; Mass Economics Analysis, 2019; note that private employment number includes coworking space/self-employed employment estimates

Clayton-Sarah

Clayton-Sarah is located east of Central West End and encompasses Cortex. About 11% of the land is industrial and the district has a large collection of railroads between the Grand and Cortex MetroLink stations. 5% of the land is currently vacant and many developments and proposals are underway.

There are about 19 jobs per acre (5,400 employees in 280 acres)¹⁹ owing in part to some undeveloped land but also some large floorplate uses like IKEA. The district is also home to hundreds of additional self-employed workers. However, Cortex is a national best-practice with respect to innovation districts and spurring job growth in technology-related fields. It has been one the regional centers for job growth over the past decade. In addition to the growing number of businesses at Cortex, Clayton-Sarah is also a center for Business Services and retail (e.g., IKEA).

Midtown

The Midtown employment district is located between the Downtown Core and Central West End. 40% of the land in Midtown is institutional including Saint Louis University and Harris-Stowe State University. 14% of the land is industrial and 7% of the land is vacant.

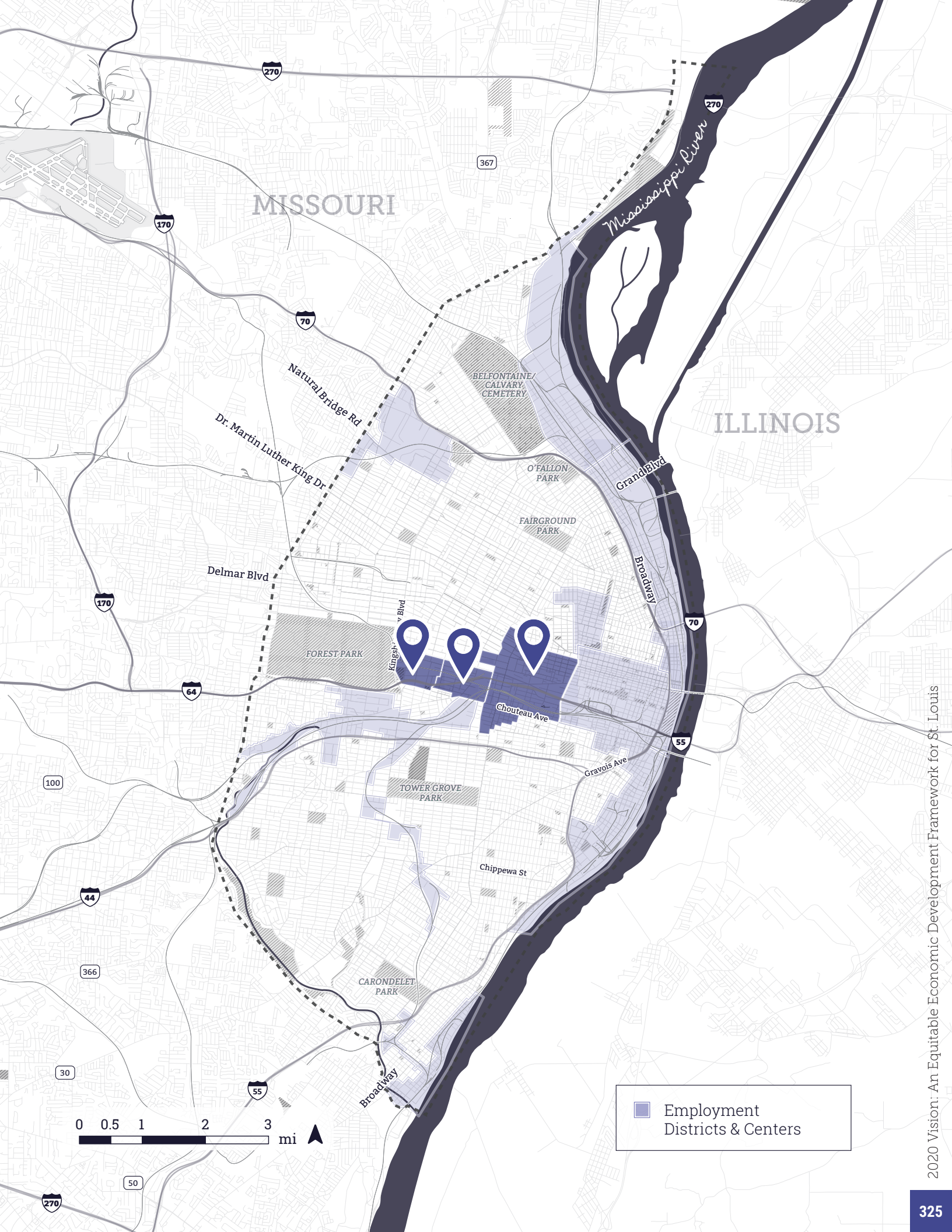
Midtown is about 1,000 acres with 27,700 employees (almost 28 jobs per acre).²⁰ In addition to the major educational institutions, the city's arts and cultural uses are concentrated here—primarily in the Grand Center Arts District—and there is a growing number of retailers and small businesses along Locust Street. Education & Training, Financial and Business Services, Health Services, Commercial Services and the Performing Arts are Midtown's key industries.

¹⁹ YTS data; QCEW-UDP; Mass Economics Analysis, 2019; Note that private employment number includes coworking space/self-employed employment estimates

²⁰ YTS data; QCEW-UDP; Mass Economics Analysis, 2019

District Vision

Central West End, Clayton-Sarah and Midtown will continue to drive job growth in the city with a continued focus on health care, business and financial services and education as well as growing specializations in bioscience, software, and technology that will help to define the city's economic future. Continued housing growth will provide opportunities for employees to live nearby and bring about additional services and amenities. The Foundry will be the newest attraction for the central corridor's hospitality industry and the creative and performing arts brings residents from throughout the region to the city. The vision is to connect the area's medical and educational institutions along with creative and tech jobs to create a vibrant, mixed-use central corridor.



CENTRAL WEST END

“I would describe Central West End area as...”

Developing because of the new projects in the area.

Dynamic because it is the home to focal point of high tech, especially med and biotech.

Exciting and growing because of the regional access to the near WU Medical Center.

Gentrifying because of the larger tech presence with fewer people of color involved in expansion.

Inspiring because it is essential to provide quality healthcare to our community and there are so many careers in this district.

St. Louis' Georgetown because of the plethora of restaurants, great condos and apartments, proximity to park, central location.

Tech-y because it's a job center with lots of tech companies and lots of shiny buildings

The healthiest area of St. Louis because of the density, medical centers, universities, extra police patrols (security roaming by off duty cops).

Vibrant because of the health system, restaurants, public transportation, Forest Park.

Source: July Open House public input

District Profile	
Size (acres)	240
Employees	28,300
Job Density	119.9
% Industrial (acres)	0%
% Vacant (acres)	2%
Number of Businesses	2,200
Largest Employment Clusters	
Clusters	Employees
Local Health Services	25,500
Education Non-Local	1,300
Tourism	360
Local Education and Training	140
Food and Beverage Manufacturing	130
Largest Businesses	
Barnes-Jewish Hospital	
St. Louis Children's Hospital	
Dupont Nutrition & Health	
Rehabilitation Institute	
St. Louis College of Pharmacy	
Noteworthy	
<ul style="list-style-type: none"> The Central West End is often referred to as the medical campus of the city. 74% of the parcels in this employment district are institutional, primarily hospitals and medical uses associated with Washington University and Barnes Jewish Hospital. There is no industrial land in the district it is almost entirely full with a vacancy rate of 2%. 	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio; Note that employment number includes coworking space/self-employed employment estimates

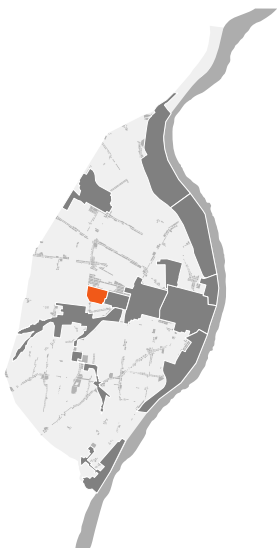




Figure CMC-1. Central West End aerial map

MIDTOWN

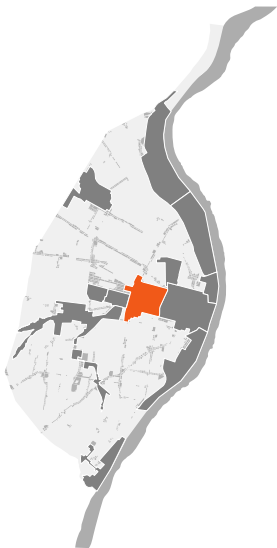
“I would describe Midtown as...”

Missing pieces because it has some strong economic activity, but still commercial vacancy and what is there caters to higher incomes.
Uplifting because the area is vibrant.

Source: July Open House public input

District Profile	
Size (acres)	1,000
Employees	27,700
Job Density	27.7
% Industrial (acres)	14%
% Vacant (acres)	7%
Number of Businesses	1,380
Largest Employment Clusters	
Clusters	Employees
Education Non-Local	8,900
Business and Financial Services	4,800
Local Health Services	3,100
Local Commercial Services	2,800
Local Community and Civic Organizations	1,600
Largest Businesses	
St. Louis University	
Wells Fargo Advisors LLC	
4M Building Solutions	
SSM Health St. Louis University Hospital	
Keeley L Paving & Construction Co.	
Noteworthy	
<ul style="list-style-type: none">• The top job clusters above represent 75% of Midtown’s total jobs• Only about 1/4 of the jobs available in Midtown are accessible to those with a high school diploma or less• The performing arts accounts for about 730 jobs in Midtown which is 44% of all performing arts jobs in the City	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



Midtown

Source: City of St. Louis, Interface Studio



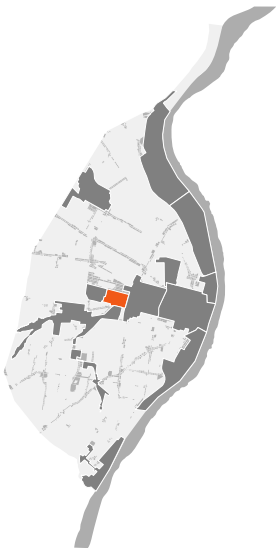
Figure CMC-2. Midtown aerial map

CLAYTON-SARAH

Note: no public comments were related to Clayton-Sarah area.

District Profile	
Size (acres)	280
Employees	5,400
Job Density	19.2
% Industrial (acres)	11%
% Vacant (acres)	6%
Number of Businesses	130
Largest Employment Clusters	
Clusters	Employees
Business and Financial Services	260
Local Household Goods and Services	220
Food and Beverage Manufacturing	220
Transportation, Distribution, and Logistics	220
Tourism	180
Largest Businesses	
IKEA	
Ronnoco Coffee LLC	
Wildhorse Creek Coffee Roaster	
Microsoft Corp.	
Mid-America Coffee Services	
Self Employed at Cortex and CET	
Noteworthy	
<ul style="list-style-type: none">About 11% of the land is industrial and the district has a large collection of railroads between the Grand and Cortex MetroLink stations. 5% of the land is currently vacant and many developments and proposals are underway.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio; Note that employment number includes coworking space/self-employed employment estimates



Clayton-Sarah

Source: City of St. Louis, Interface Studio

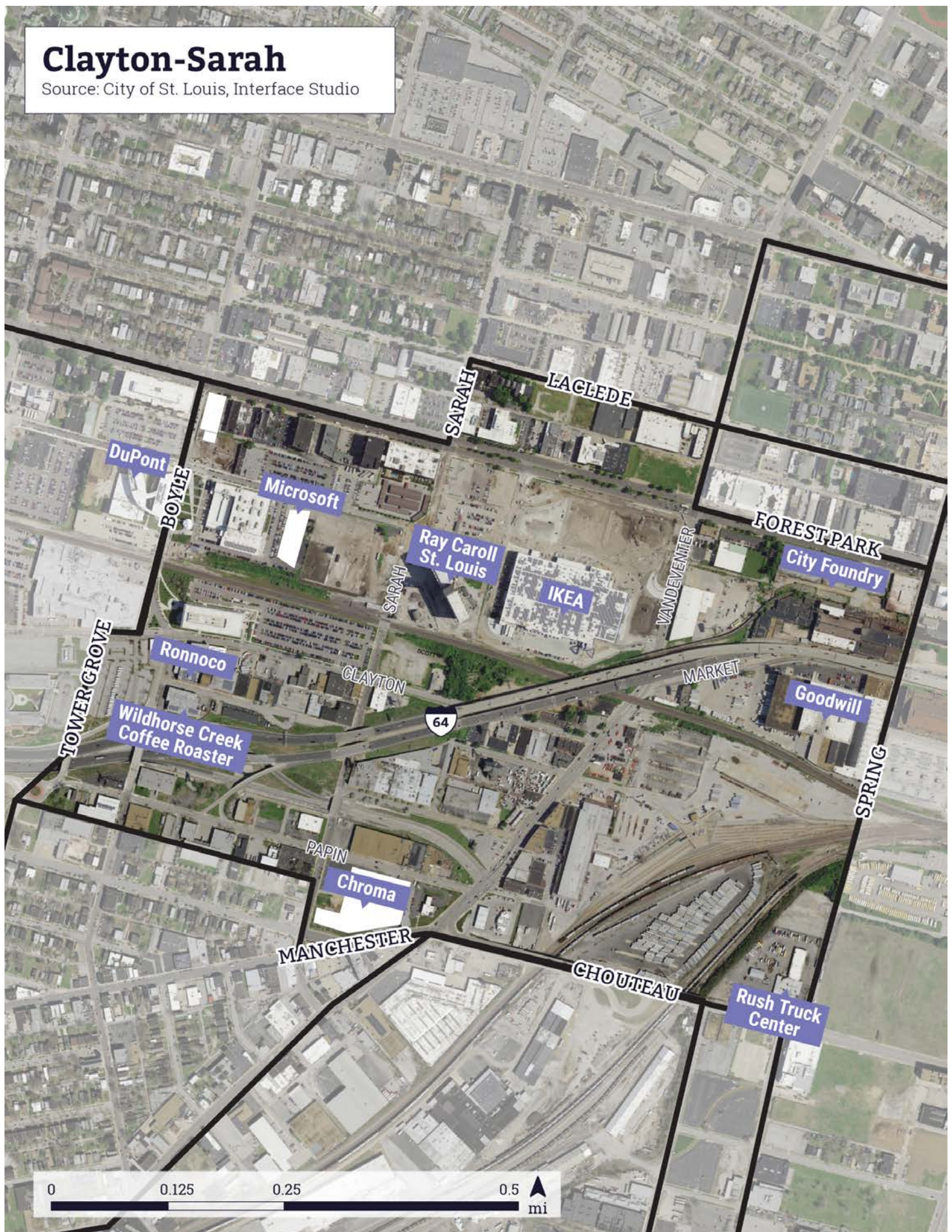


Figure CMC-3. Clayton-Sarah aerial map

Strategies and Action Items

Strategy
1

Coordinate key stakeholders / organizations in Midtown

Central West End is guided by work by the Park Central Development CDC and the investment of strong institutional and private employers. A plan completed for the Cortex Innovation Community is guiding development in Clayton-Sarah and Cortex is currently engaged in strategic planning. In Midtown, there is the Grand Center CDC, major institutions including SLU and Harris-Stowe, major employers that operate major campuses (Wells Fargo) and a number of smaller developers that are transforming corridors like Locust Street. During this process, fifteen of these leaders in Midtown came together to discuss the area's future and role in the city's growth. The consensus was for greater coordination around planning, investments and physical improvements. This group expressed confusion about which organization is leading specific initiatives and noted that too often proposals are made without the benefit of an umbrella vision and plan.²¹ There are so many organizations with specific missions and roles that a coordinating role is necessary to better accomplish shared goals.

Action Item #: <u>CMC-1.1</u>	Work with Cortex to create and staff a Midtown coordinating committee to meet twice a year
Leader	SLDC
Potential Partners	Cortex, Grand Center CDC, Harris-Stowe, St. Louis Midtown Redevelopment Corporation, Wells Fargo, private developers
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	TBD
Goal/s	Development of a shared list of actions for Midtown stakeholders
Tracking Progress	Updated list of committee members and meetings

21 Project interviews and roundtables



Potential partners/organizations

Strategy 2

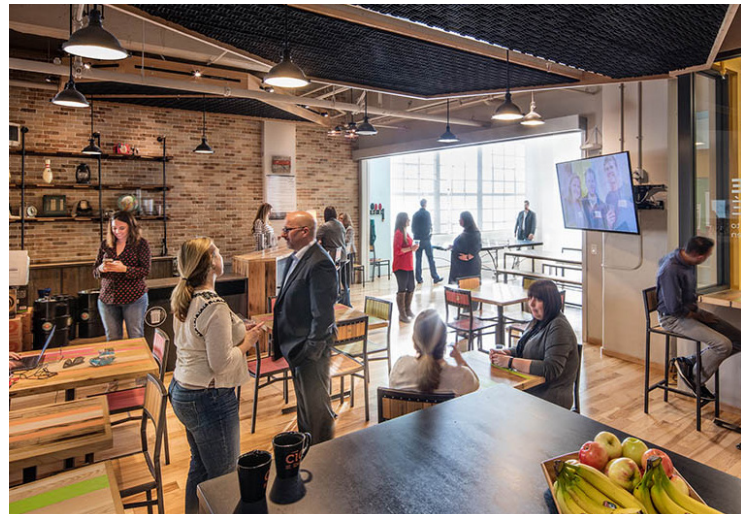
Support ongoing planning for Cortex (more mixed-use)

Original plans for Cortex include new housing. With the success of Cortex drawing national attention, it is important to develop a broader mix of uses for the area. New housing is needed to attract new services and amenities but also provide options for living within walking distance to work.

Action Item #: <u>CMC-2.1</u>	Support ongoing strategic planning for Cortex
Leader	Cortex
Potential Partners	SLDC
Start Time	Ongoing
Duration	1 year / ongoing
Effort to Implement	Low
Potential Funding	Cortex TIF
Goal/s	New mixed-use development to support Cortex
Tracking Progress	Building permits and various design proposals



Cortex
Source: cortexstl.com



CIC at Cortex
Source: cic.com/stlouis

EMPLOYMENT CENTERS

CARONDELET AND PATCH

Overview

Located at the southern tip of the city, 35% of the land in Carondelet and Patch is industrial and 18% is vacant or has a vacant building. Of the vacant parcels, 6% are larger than 5 acres. The Carondelet and Patch neighborhoods surround this district with South Broadway acting as the main spine that divides the industrial and residential areas.

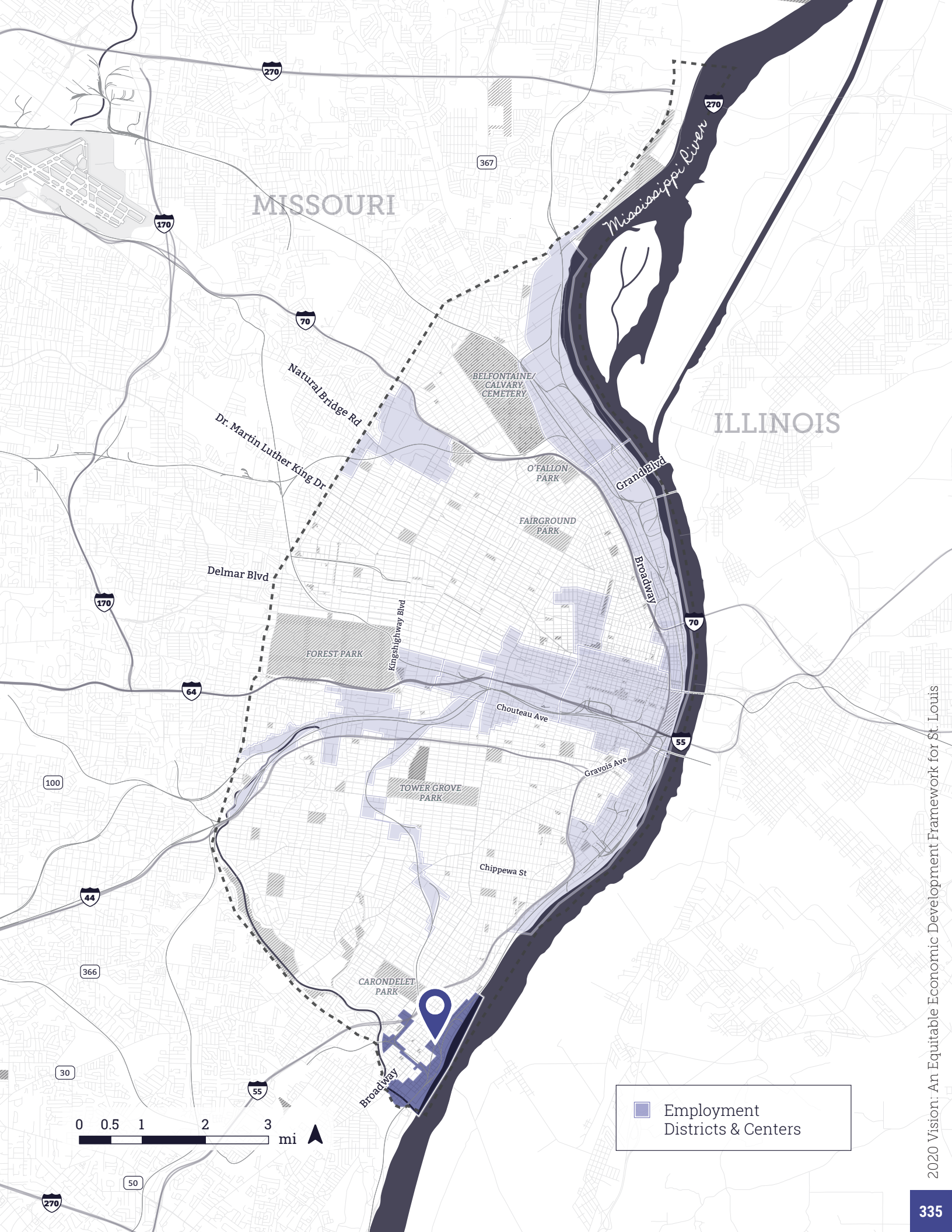
Carondelet and Patch is 660 acres and has about 1,000 employees²² - roughly 1.6 jobs per acre. The employment center's key industries are manufacturing (e.g., food, furniture, metals, chemicals) or distribution-related and portions of the district are within the floodplain.

District Vision

Carondelet is a dense and diverse community of both people and businesses. It combines traditional industrial jobs around transportation, distribution, and logistics (TDL) and food processing and artisanal manufacturing and production. S. Broadway is improved to better serve residents and industrial operations and serves as home to creative and small businesses. Carondelet will remain the "capital of weird" in St. Louis and express its individuality through improved branding, its historic architecture and public art. Strategies for this employment center will support efforts to further improve the neighborhood's commercial center along Ivory Avenue and Michigan Avenue.

Carondelet will remain the "capital of weird" in St. Louis and express individuality through improved branding, its historic architecture and public art.

²² YTS data; QCEW-UDP; Mass Economics Analysis, 2019



CARONDELET/PATCH

“I would describe Carondelet/Patch area as...”

Friendly because of the park and families/housing.

Industrial because of railroad and industry.

Intimidating because there is so much vacant and abandoned property that is not being maintained.

Quaint because old/elderly residents, and not much “pop.” Now there’s a coffeehouse - new habitat homes.

Vacant because there are too many vacant properties.

Source: July Open House public input

District Profile	
Size (acres)	660
Employees	1,000
Job Density	1.5
% Industrial (acres)	35%
% Vacant (acres)	18%
Number of Businesses	70
Largest Employment Clusters	
Clusters	Employees
Transportation, Distribution, and Logistics	470
Real Estate, Construction, and Development	130
Food and Beverage Manufacturing	100
Downstream Metal Products	60
Local Industrial Products and Services	60
Largest Businesses	
ICL Performance Products LP	
Riviana Foods Inc	
US Durum Milling Inc	
Italgrani USA Inc	
Eagle Fleet & Services	
Noteworthy	
<ul style="list-style-type: none"> • The top 3 job clusters in Carondelet are increasing in employment citywide (slightly) • Almost 40% of top industries here are available to those with a high school diploma or less • Half of the jobs can be done with no to short term on-the-job training • Carondelet has the lowest job density of all industrial / commercial districts - below 2 jobs per acre 	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio

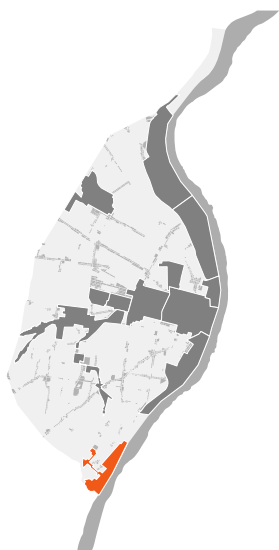




Figure CP-1. Carondelet/Patch aerial map

Strategies and Action Items

Strategy
1

Assemble and market key sites for industrial development

There are 18 opportunity sites in Carondelet, six of which are between 2 and 10 acres and three of which are over 20 acres. There are three sites that are entirely publicly-owned in the northern portion of the area but the remaining sites require acquisition from private owners, and many are along, or visible from, S. Broadway. The recent business park with one building developed occupies the largest, market-ready site for industrial development.

Action Item #: <u>CP-1.1</u>	Conduct research and preliminary outreach on parcels and parcel owners within potential assemblies to assess viability, timing, and necessary actions to help enable site development
Leader	SLDC
Potential Partners	Carondelet Business Association, Planning & Urban Design Agency
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	N/A
Goal/s	Collect necessary information to make decision on go/no-go for site assembly and take steps toward supporting development (e.g., parcel acquisition, release of competitive land assembly RFP)
Tracking Progress	Total investment, number of new businesses, number of employees

Strategy 2

Improve South Broadway and targeted cross streets as front doors to the districts

All traffic serving industrial business on the river or smaller commercial business in the neighborhood uses S. Broadway. It is built like a traditional retail corridor but serves fast-moving thru-traffic and trucks. In short, it has many competing demands but serves none very well at the moment. There are a number of vacant buildings and lots and the sidewalks are very narrow. The wide street encourages fast-moving traffic which, according to local business owners, has led to some cars parked on-street to be totaled. Work has been done to upgrade crosswalks and improve the street's curbs and sidewalks. There are opportunities to redesign S. Broadway to integrate public art and wayfinding that will help Carondelet to visibly realize its "capital of weird" brand.²³ Additionally, vacant spaces and blight fuel negative perceptions about safety and reinforce the real issues on the ground around homelessness and prostitution. Targeted blight removal and ongoing coordination with the local police officers is necessary to help business owners address these challenges.

23 Project interviews and roundtables

Action Item #: <u>CP-2.1</u>	Develop an action and branding plan for S. Broadway
Leader	SLDC
Potential Partners	Board of Public Service, Carondelet Community Betterment Federation, Patch Neighborhood Association, Planning & Urban Design Agency
Start Time	Year 2
Duration	1 year
Effort to Implement	Low
Potential Funding	Local Aldermen, SLDC
Goal/s	Completed action plan for S. Broadway
Tracking Progress	Periodic update on implementation of action plan
Action Item #: <u>CP-2.2</u>	Target blight removal adjacent to S. Broadway
Leader	SLDC
Potential Partners	Carondelet Business Association, Planning & Urban Design Agency, Vacancy Collaborative
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	City, local aldermen
Goal/s	Reduced vacancy and trash
Tracking Progress	Parcel-based vacancy data, street condition survey

Action Item #: CP-2.3	Activate and improve façades
Leader	SLDC
Potential Partners	Carondelet Business Association, Regional Arts Commission, local businesses
Start Time	Year 1
Duration	2 years
Effort to Implement	Medium
Potential Funding	Arts grant, business contributions
Goal/s	New, visible public art & improved façades
Tracking Progress	Installed art locations, façade-improved storefront locations



Street art placed on S Broadway (top) and S Broadway storefronts near Loughborough Ave. (bottom)

Strategy 3

Create landscape buffers to protect nearby residential and community uses

Some industrial uses need space from residential ones. Truck access, noise and other issues can have severe negative impacts on homes. In Carondelet, there are a few locations where industrial uses are sitting immediately next to residential streets and homes. To help mitigate impacts, landscape buffers should be considered. Landscape buffers integrate new landscaping and tree plantings to help absorb noise and create clear delineations between different uses. With enough of the right kinds of plantings, they can also serve to reduce stormwater run-off and absorb carbon from cars and trucks. There are a number of streets where added attention to buffering industrial uses should be considered including Poepping Street, west of S. Broadway; portions of Primm Street; and portions of Alaska and Alabama Streets.

Action Item #: <u>CP-3.1</u>	Create site-specific landscape strategies
Leader	Green City Coalition, Parks Dept., Planning & Urban Design Agency, Zoning
Potential Partners	Board of Public Service, Forest Releaf of Missouri, Gateway Greening, LRA, Missouri Department of Conservation, Vacancy Collaborative
Start Time	Year 1
Duration	3-5 years
Effort to Implement	High
Potential Funding	Local aldermen
Goal/s	Investment / implementation strategy
Tracking Progress	Sq. ft. of new landscape buffer, amount invested

Strategy 4

Identify key infrastructure challenges

A redevelopment plan for Carondelet and Patch is necessary to identify and prioritize specific infrastructure improvements that will serve the needs of local business and better protect business from flooding.

Action Item #: <u>CP-4.1</u>	Undertake a Carondelet redevelopment plan
Leader	Metropolitan Sewer District, SLDC
Potential Partners	Carondelet Business Association, Planning & Urban Design Agency
Start Time	Year 2
Duration	3-5 years
Effort to Implement	Medium
Potential Funding	Economic Development Tax
Goal/s	Prioritized improvement list
Tracking Progress	Amount invested in infrastructure

Carondelet/Patch Potential Strategy

Source: Interface Studio, Mass Economics, City of St. Louis

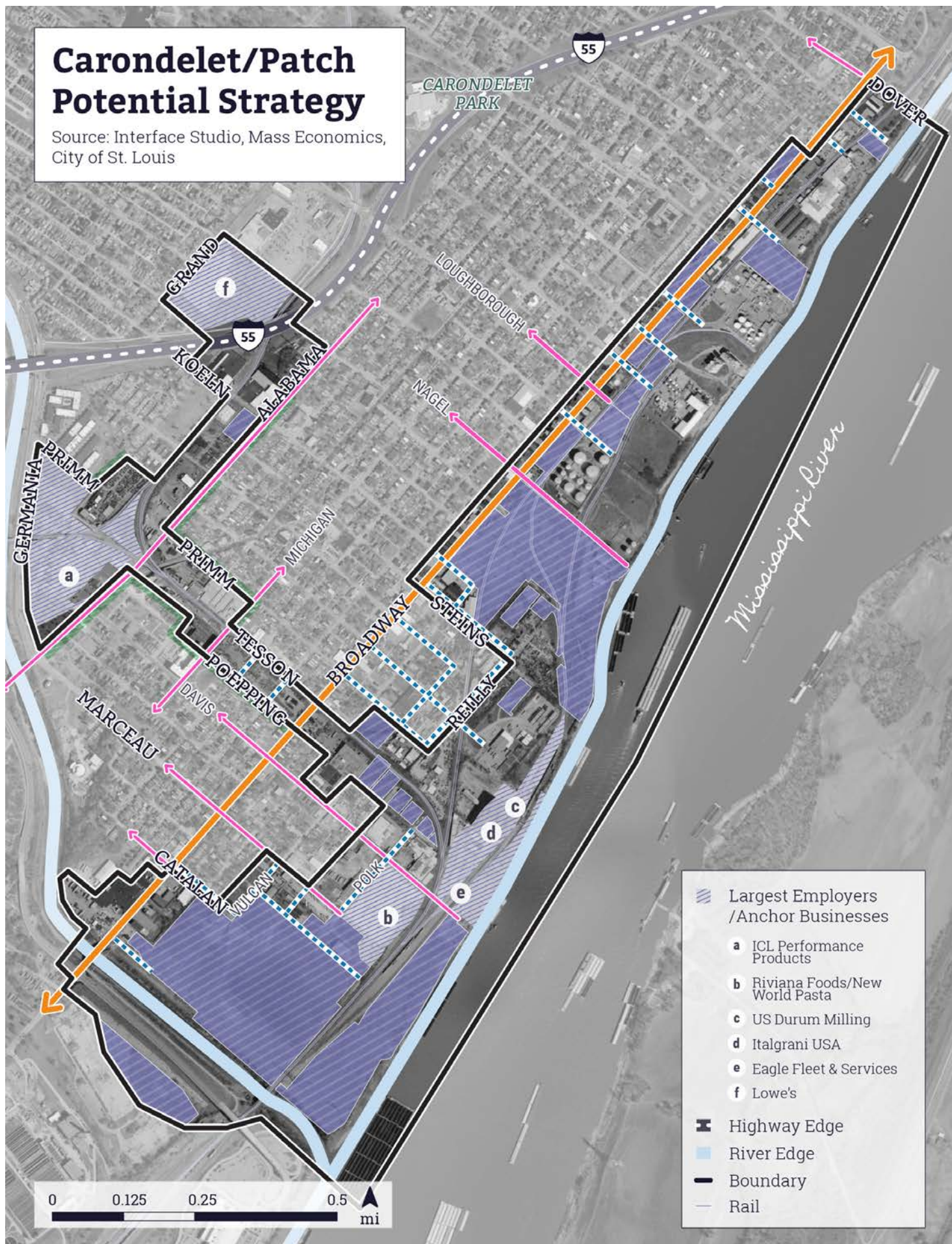



Figure CP-2. Carondelet/Patch potential strategy




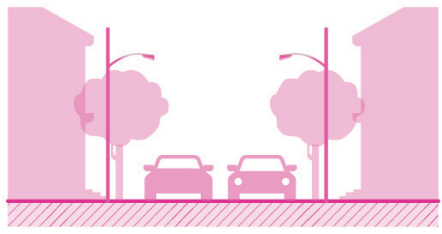

Potential Opportunity & Investment

Assemble land for potential development on a collection of multiple parcels that are currently vacant and/or underutilized.




Front Door

Front Door functions as main entrance to a district. Potential improvements include lighting, wayfinding, streetscape, façade improvements, landscaping and street surface upgrades.



Neighborhood Connector

Designed to establish clear connections between employment districts and adjacent neighborhoods. Potential improvements include wayfinding and landscaping.




Access Street

Access Streets are intended to serve the needs of existing and new businesses and designed to accommodate truck access.

Green Buffer

Green Buffers provide a landscaped separation between industrial uses, rail or highways and nearby neighborhoods.

Figure CP-3. Proposed improvements in Carondelet/Patch

EMPLOYMENT CENTERS

MARK TWAIN/I-70

MARK TWAIN/I-70 IS ENVISIONED AS AN INDUSTRIAL JOBS CENTER OFFERING WELL-PAYING INDUSTRIAL JOB OPPORTUNITIES IN THE HEART OF NORTH ST. LOUIS.

Overview

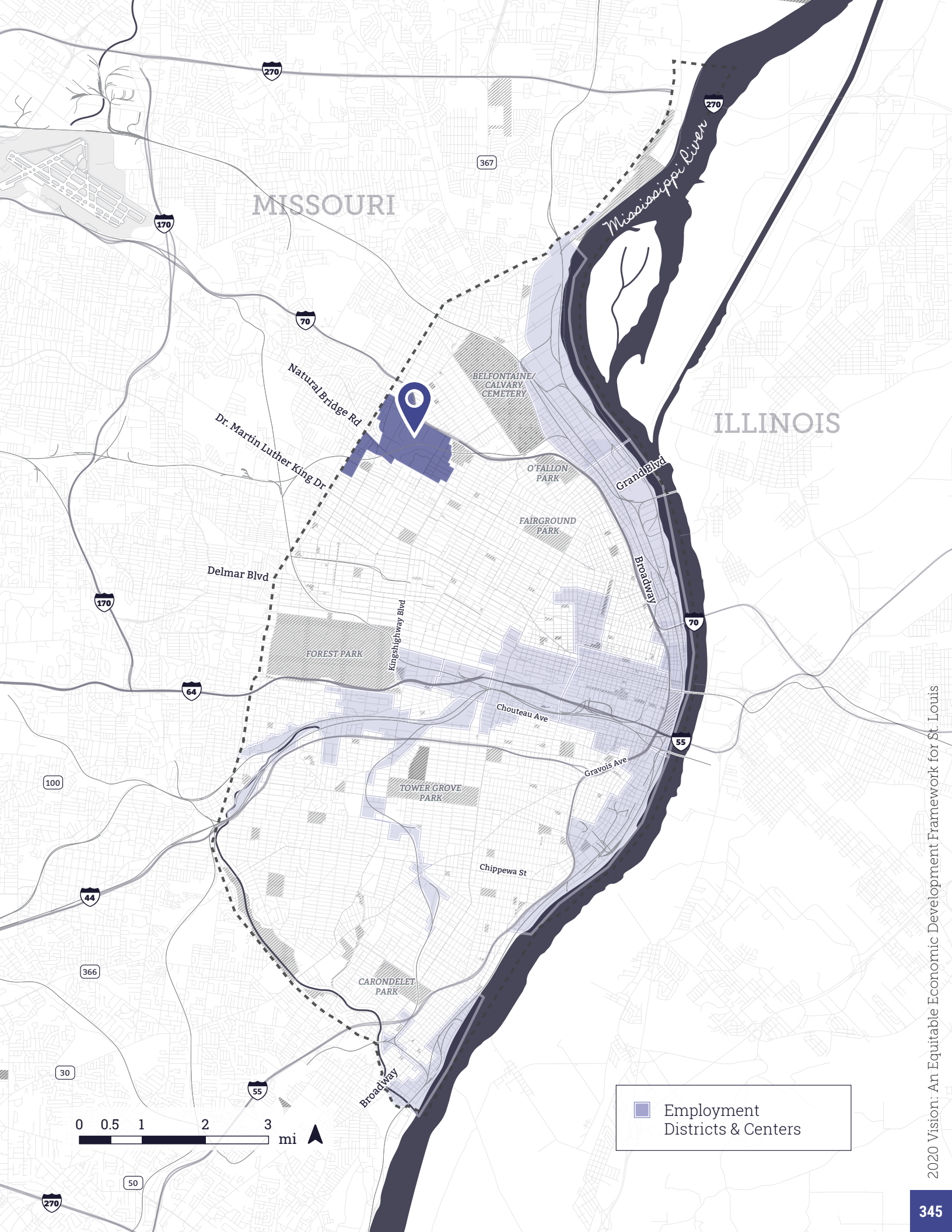
The Mark Twain/I-70 employment center is located near the intersection of the city's western boundary. Almost 50% of the land use is industrial, and the average parcel size of 2.4 acres. 17% of the land here is currently vacant and 8% of these empty parcels are larger than 5 acres in size.

Mark Twain/I-70 includes 2,700 employees over 830 acres, a job density of approximately 3.2 jobs per acre.²⁴ The federal government is a major employer due to presence of the U.S. Army Reserve Center. Key industries include various manufacturing and TDL. Newer industrial and commercial businesses are centered along Brown Avenue, a security-controlled road through what was once the city's GM factory.

24 YTS data; QCEW-UDP; Mass Economics Analysis, 2019

District Vision

Mark Twain/I-70 is envisioned as an industrial jobs center offering well-paying industrial job opportunities in the heart of North St. Louis. Mark Twain/I-70's access to freight infrastructure and I-70 as well as its proximity to the St. Louis Lambert International Airport will establish a hub for transportation, distribution, and logistics (TDL) activities. New and legacy businesses in urban manufacturing, business to business (B2B) services, construction and general industrial will reinforce Mark Twain/I-70 as one of the city's largest and most important industrial centers. Strategic land assembly efforts will open up development opportunities on multiple sites that will increase job density and economic activity. To the south and west, new green spaces will help to buffer homes from the impacts of nearby industrial users. Natural Bridge Avenue will provide a valuable interface between Mark Twain/I-70 and surrounding communities where stores and services provide amenities for employees and residents and a one-stop pilot project connects residents and employees to services.



MARK TWAIN/I-70

“I would describe Mark Twain/I-70 as...”

Complacent because there are too many vacant structures. Food desert. Need more shops/restaurants and a community center.

Crime-riddled because of the political and corporate will (or the lack of).

Descent because it's near SLU and upkept I believe for that purpose.

Empty because it lacks sufficient businesses and a coordinated effort to feel like a community in its design.

Lacking because there are no grocery stores, few quality schools, and crime/drugs/prostitution and very little development. We have POTENTIAL, but no \$.

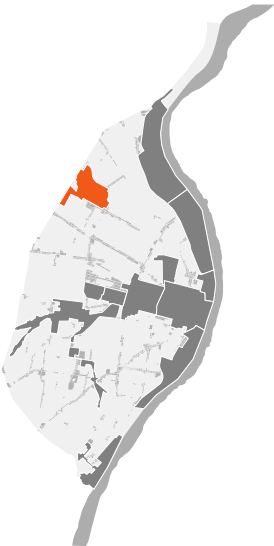
Needing businesses because residents have to leave the area for practically every service. Unmet demands.

Underdeveloped because of the politics and budget.

Source: July Open House public input

District Profile	
Size (acres)	830
Employees	2,700
Job Density	3.3
% Industrial (acres)	50%
% Vacant (acres)	17%
Number of Businesses	140
Largest Employment Clusters	
Clusters	Employees
Transportation, Distribution, and Logistics	550
Furniture	390
Chemicals and Metals	370
Business and Financial Services	200
Automotive and Motor Vehicle Services	200
Largest Businesses	
Pepsi Beverages Co.	
ABB Inc.	
Titan Tube Fabricators	
Argo Products	
Gateway Rack Corp.	
Noteworthy	
<ul style="list-style-type: none">• Approximately 40% of the jobs in the top clusters are available to residents with a high school diploma or less.• 50-70% of jobs in these clusters require limited to no on-the-job training.• Mark Twain has a very low job density of about 4 jobs per acre including government employment.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



Mark Twain

Source: City of St. Louis, Interface Studio

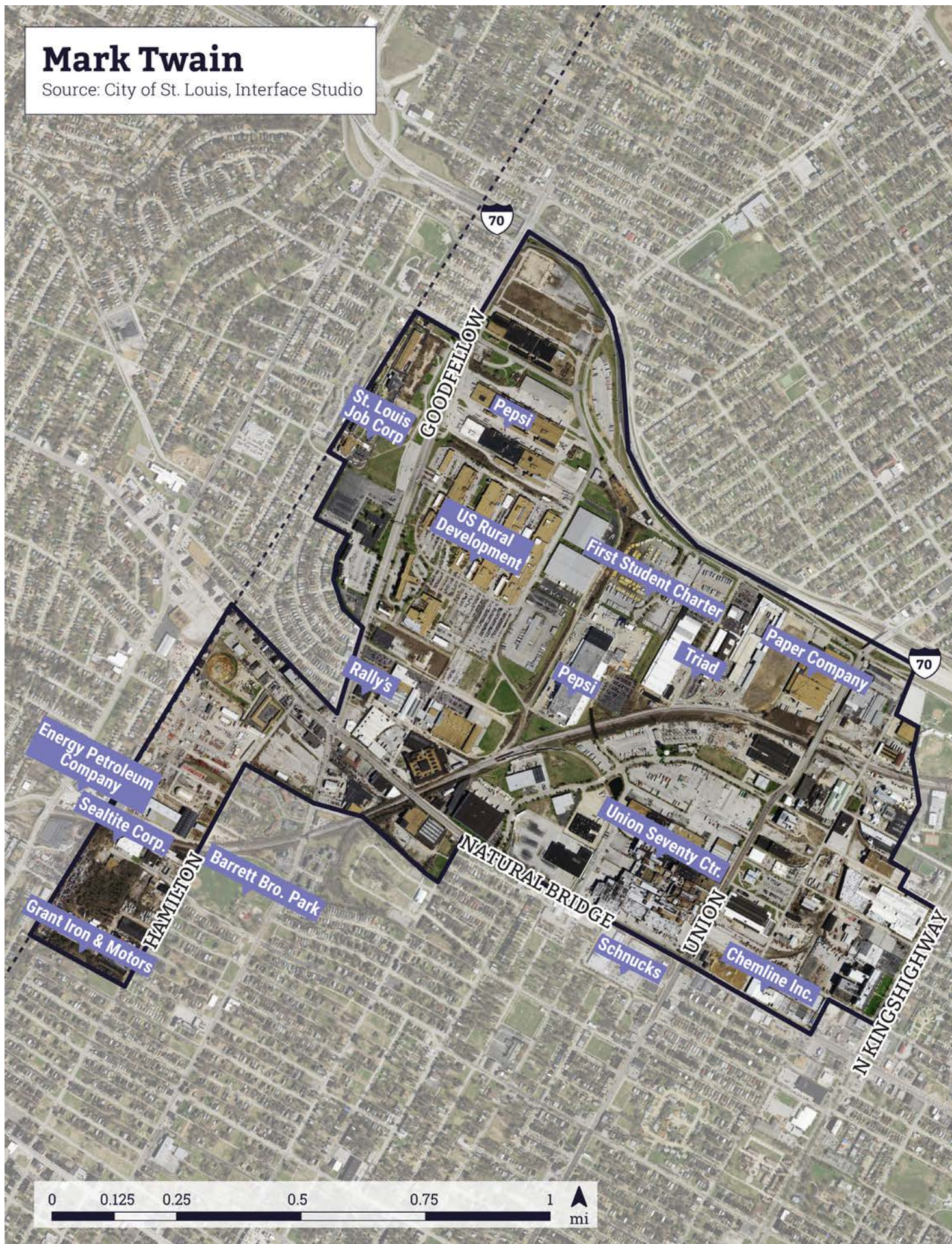


Figure MT-1. Mark Twain/I-70 aerial map

Strategies and Action Items

Strategy 1

Improve Natural Bridge Avenue, Union Avenue, and Goodfellow Boulevard as the “front doors” of the district

Mark Twain/I-70 is accessed by many different routes and therefore has a few different “front doors” that welcome employers and employees. To help attract private investment and employees, it is important that the area presents a good first impression. This is the reason “industrial parks” around the country focus on landscaping and public improvements. Front door improvements should be focused on Natural Bridge Avenue, Union Avenue and Goodfellow Boulevard where the primary traffic and access points to Mark Twain/I-70 are located. The opportunities include: new streetscape improvements along Natural Bridge Avenue that help to connect industrial businesses with important services like restaurants and the existing Schnucks; traffic calming, landscaping and wayfinding along Goodfellow Boulevard and Union Avenue; blight removal for highly visible properties; and public art on large, blank façades that face these major corridors.

Action Item #: <u>MT-1.1</u>	Develop and update (where applicable) design documents for each corridor
Leader	Board of Public Service, Planning & Urban Design Agency
Potential Partners	SLDC
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local aldermen
Goal/s	Completed schematic design
Tracking Progress	Total public and private investment along each corridor
Action Item #: <u>MT-1.2</u>	Target blight removal adjacent to Mark Twain
Leader	Planning & Urban Design Agency, Streets Dept., SLDC
Potential Partners	Green City Coalition, Vacancy Collaborative
Start Time	Year 1
Duration	1 year
Effort to Implement	High
Potential Funding	City, local aldermen
Goal/s	Reduced vacancy and trash
Tracking Progress	Number of vacant structures demolished, total amount of trash removed, number of cleaned vacant parcels

Action Item #: <u>MT-1.3</u>	Activate blank façades
Leader	SLDC
Potential Partners	Regional Arts Commission, arts organizations, local businesses
Start Time	Year 1
Duration	3-5 years
Effort to Implement	High
Potential Funding	Arts grant, business contributions
Goal/s	New, visible public art
Tracking Progress	Installed art locations, façade-improved storefront locations



Existing storefronts along Natural Bridge Ave.

PRECEDENT

STOREFRONT MURAL
San Francisco, CA

Often Wander by Celeste Byers
<https://www.wescover.com/p/murals-by-celeste-byers-at-often-wander-PHKY6YyGKE>

PRECEDENT

MURAL
Vyska, Russia

Evolution 2 by Misha Most
<https://www.designboom.com/art/misha-most-evolution-2-largest-mural-in-the-world-russia-07-08-2017/>

Strategy 2

Upgrade key intersections

Natural Bridge Avenue acts as the primary east-west street with access to multiple Mark Twain/I-70 businesses. There are opportunities to improve key crossings with major north-south corridors including Goodfellow Boulevard, Union Avenue, Geraldine Avenue and N. Kingshighway Boulevard. In the short-term, key improvements include crosswalks and entryway signage to help brand Mark Twain/I-70. Later, the stations in the MetroLink expansion – potential stations are identified at Natural Bridge Avenue at Goodfellow Boulevard, Union Avenue and N. Kingshighway Boulevard – should be integrated into the design of the street in these locations and promote transit-oriented design principles that encourage higher development densities. In these locations, TOD designs should evaluate opportunities for new commercial and industrial spaces that offer a mix of spaces for small and growing businesses. Areas to the south of Natural Bridge Avenue away from existing industrial uses are better suited for housing.

Action Item #: <u>MT-2.1</u>	Identify specific improvements at each intersection
Leader	Board of Public Service, Streets Dept.
Potential Partners	Planning & Urban Design Agency, local businesses, SLDC
Start Time	Year 1
Duration	2 years
Effort to Implement	Medium
Potential Funding	Aldermen
Goal/s	Improvement plan
Tracking Progress	Total public investment at each intersection



Stores at Natural Bridge Ave. & Goodfellow Blvd.



Natural Bridge Ave. & N Kingshighway Blvd.

Strategy 3

Create landscape buffers to protect nearby residential and community uses

Truck access, noise and other issues can have severe negative impacts on residential living, creating a need to buffer certain industrial uses from residential ones. In Mark Twain/I-70, there are a few locations where industrial uses are sitting adjacent to residential streets and homes. To help mitigate impacts, landscape buffers that integrate new landscaping and tree plantings should be used to help absorb noise and create clear delineations between different uses. With enough of the right kinds of plantings, they can also serve to reduce stormwater run-off and absorb emissions from cars and trucks. There is limited space in some cases between Mark Twain/I-70 businesses and nearby residents so the ability to design wide buffers is limited. Three design strategies are needed: 1) portions of Hamilton Avenue should be redesigned to allocate some of the existing asphalt to space for landscaping and tree planting; 2) in partnership with property owners, new landscaping should be integrated on excess/unused industrial land facing Darby Street and Pennrose Avenue (west of Goodfellow Blvd.); and 3) more robust landscape treatment should be designed for areas around the existing Pennrose Park and Boys and Girls Club west of N. Kingshighway Blvd.

Action Item #: <u>MT-3.1</u>	Create site-specific landscape strategies
Leader	Green City Coalition, Parks Dept., Planning & Urban Design Agency, Zoning
Potential Partners	Board of Public Service, Forest Releaf of Missouri, Gateway Greening, LRA, Missouri Department of Conservation, Vacancy Collaborative
Start Time	Year 1
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local aldermen
Goal/s	Investment / implementation strategy
Tracking Progress	Sq. ft. of new landscape buffer, amount invested

Strategy 4

Assemble and market key sites for industrial development

There are 19 opportunity sites in Mark Twain/I-70, four of which are over ten acres. There are an additional six sites between five and ten acres. All of the sites require acquisition from private owners. To help facilitate development for industrial uses, two sites currently zoned for "regional commercial development" – one between Stratford Avenue and I-70 and the other along N. Kingshighway Blvd. between San Francisco and Farlin Avenues – should be re-zoned for industrial use. There is a concentration of opportunity sites between Union Avenue and N. Kingshighway Blvd. stretched along Geraldine Avenue. SLDC should consider 1) making strategic land acquisitions to "get ahead of the market" and own one or more parcels within these assemblies and 2) utilize a public, competitive land assembly RFP process and the promise of a fast-tracked re-zoning to incentivize the assembly of parcels across private owners. SLDC and the city should work with local property owners during the redevelopment plan for this area to evaluate the possibility of creating another controlled access industrial "park" similar to the Union 70 Center Business Park across Union Avenue.

Action Item #: <u>MT-4.1</u>	Re-zone existing commercial properties for industrial use
Leader	Planning & Urban Design Agency, Zoning
Potential Partners	Aldermen, SLDC
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	N/A
Goal/s	Rezoning
Tracking Progress	Number of properties re-zoned; neighborhood engagement around re-zoning in concert with neighborhood goals
Action Item #: <u>MT-4.2</u>	Develop a plan to create a controlled-access street for industrial businesses between Union and Kingshighway
Leader	Board of Public Service, Streets Dept.
Potential Partners	Planning & Urban Design Agency, local businesses, SLDC
Start Time	Year 2
Duration	2 years
Effort to Implement	High
Potential Funding	TBD
Goal/s	Industrial park expansion plan
Tracking Progress	Existing industrial park survey - utilization, vacancy, ownership

Action Item #: <u>MT-4.3</u>	Conduct research and preliminary outreach on parcels and parcel owners within potential assemblies to assess viability, timing, and necessary actions to help enable site development
Leader	SLDC
Potential Partners	Planning & Urban Design Agency
Start Time	Year 1
Duration	1 year
Effort to Implement	Medium
Potential Funding	TBD
Goal/s	Collect necessary information to make decision on go/no-go for site assembly and take steps towards supporting development (e.g. parcel acquisition, release of competitive land assembly RFP)
Tracking Progress	Number of new businesses, total number of employees, amount invested
Action Item #: <u>MT-4.4</u>	Identify land available for greening (available for clean and green initiatives to remove blight and improve the marketability of the area)
Leader	Planning & Urban Design Agency
Potential Partners	Green City Coalition, Great Rivers Greenway, SLDC
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	Local aldermen, SLDC
Goal/s	Land set aside for greening
Tracking Progress	Existing parcel data - vacancy, utilization, ownership

Strategy 5

Create a local business association

Due to major roads, freight rail and empty or underutilized land, Mark Twain/I-70 is largely a fragmented district. The Union 70 Center Business Park is the one identifiable management entity in the area. However, businesses in Mark Twain/I-70 face similar challenges including blight, aging infrastructure and attracting employees. A local business association would help to coordinate and prioritize local needs and advocate for the district with one voice. Completing a redevelopment plan for Mark Twain/I-70 is the opportunity to engage and recruit key business and property owners to the table as a more formally connected association. The association should meet quarterly and establish a primary point of contact with SLDC, local aldermen and partners.

Action Item #: <u>MT-5.1</u>	Develop clear roles and a responsibilities checklist for a business association
Leader	SLDC
Potential Partners	TBD
Start Time	Year 1
Duration	1 year
Effort to Implement	Medium
Potential Funding	TBD
Goal/s	Empower a local group of business and property owners to partner with SLDC
Tracking Progress	Updated list of businesses and representatives



Union Seventy Center directory



HY Robotics entrance at Union Blvd. & Brown Ave.

COMPLETING A REDEVELOPMENT PLAN FOR MARK TWAIN IS THE OPPORTUNITY TO ENGAGE AND RECRUIT KEY BUSINESS AND PROPERTY OWNERS TO THE TABLE AS A MORE FORMALLY CONNECTED ASSOCIATION.



Penrose St. & Geraldine Ave



Vacant Garrett & Company building on Union Blvd.

Mark Twain/I-70 Potential Strategy

Source: Interface Studio, Mass Economics

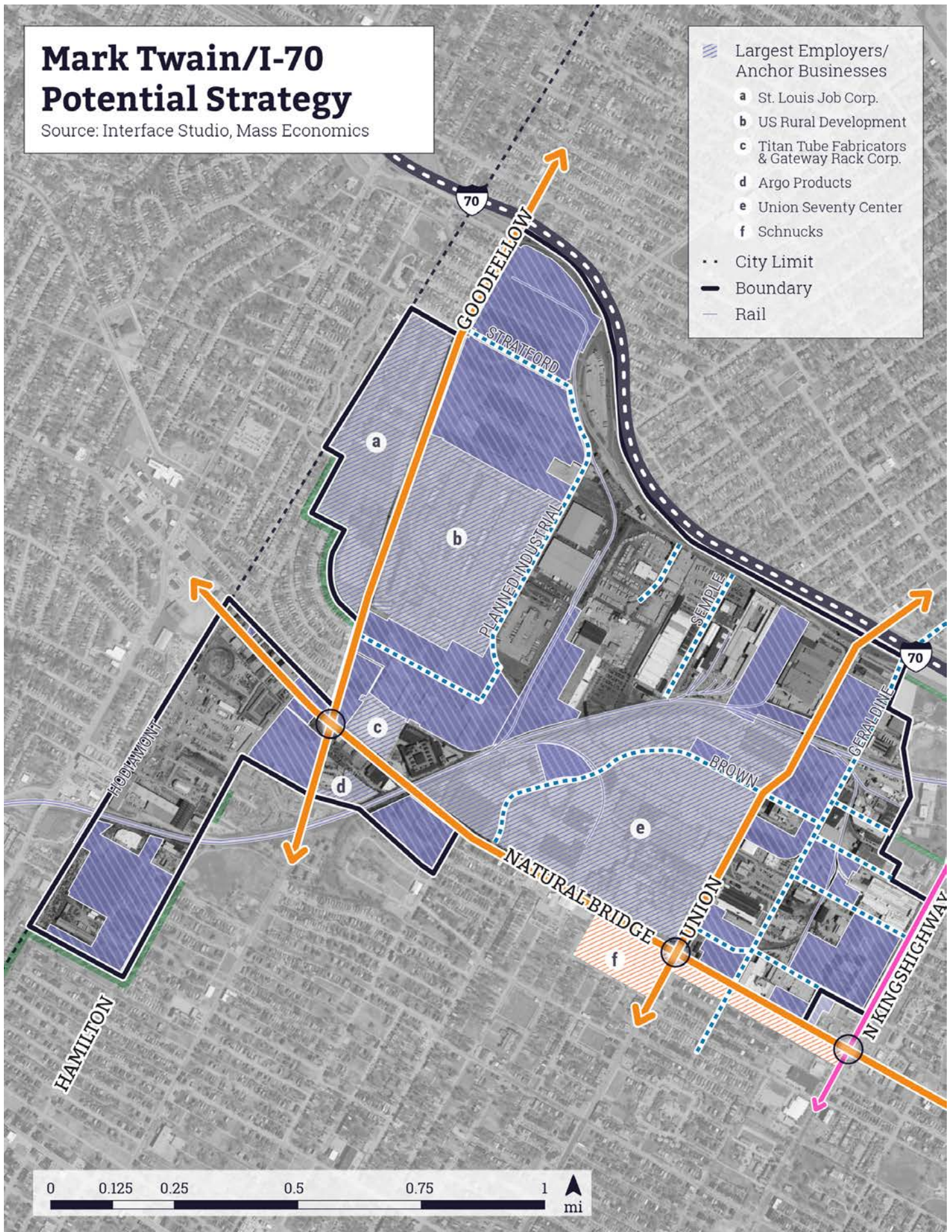
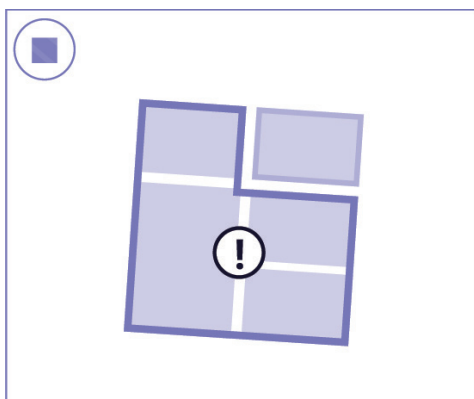
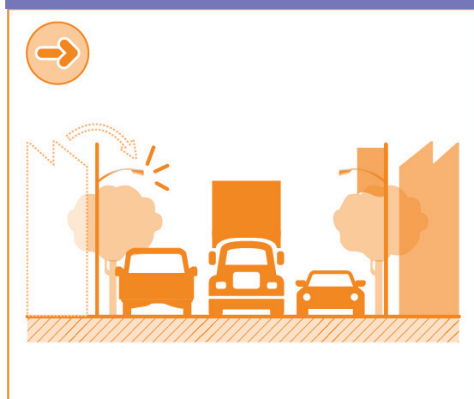


Figure MT-2. Mark Twain/I-70 potential strategy



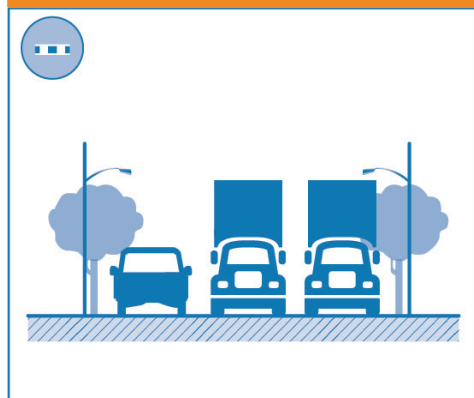
Potential Opportunity & Investment

Assemble land for potential development on a collection of multiple parcels that are currently vacant and/or underutilized.



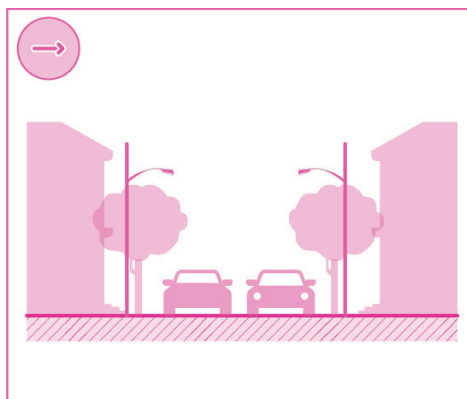
Front Door

Front Door functions as main entrance to a district. Potential improvements include lighting, wayfinding, streetscape, façade improvements, landscaping and street surface upgrades.



Access Street

Access Streets are intended to serve the needs of existing and new businesses and designed to accommodate truck access.



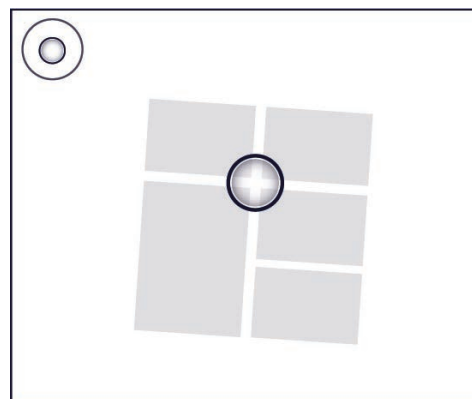
Neighborhood Connector

Designed to establish clear connections between employment districts and adjacent neighborhoods. Potential improvements include wayfinding and landscaping.



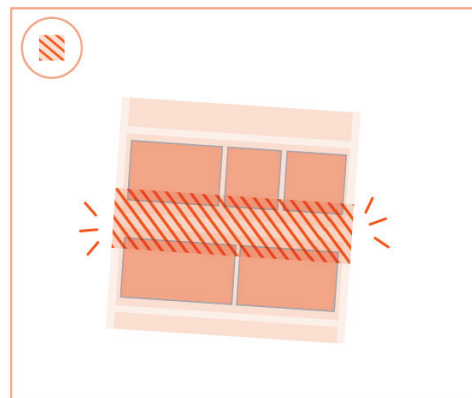
Green Buffer

Green Buffers provide a landscaped separation between industrial uses, rail or highways and nearby neighborhoods.



Intersection Upgrade

Intersections are upgraded with crosswalks and entryway signage.



Supporting Commercial Corridor

Support and enhance the existing commercial activity through branding, signage, marketing and streetscaping.

Figure MT-3. Proposed improvements in Mark Twain/I-70

EMPLOYMENT CENTERS

NEAR NORTH RIVERFRONT AND NORTH RIVERFRONT

Overview

This framework divides the “near North-” and North Riverfront” into two separate areas in that they offer different advantages and disadvantages. However, both are included within the 2011 North Riverfront Commercial Corridor Land Use Plan that includes detailed recommendations for development and infrastructure. To be consistent with that strategy, which remains the guiding document for the area, these areas are discussed together. The strategies and actions proposed here are built upon the foundation of that 2001 Plan and consistent with its vision and approach.

Near North Riverfront

The Near North Riverfront employment center includes the Municipal River Terminal near Market Street and is largely (44%) industrial. Nineteen percent (19%) of the area is identified as either vacant land or as having a vacant building. Only 1% of these vacant parcels are larger than 5 acres.

There are 4,400 employees in Near North Riverfront (1,370 acres) which amounts to about 3.2 jobs per acre.²⁵ The Municipal River Terminal and the rail infrastructure provide an easy access to shipping and transportation, allowing this area to become one of the city’s primary transportation, distribution, and logistics (TDL) locations. Agricultural product and food processing is another key industry of this employment center, and the Near North Riverfront is an important component of St. Louis’ AgCoast (along with the rest of the city’s riverfront).

25 YTS data; QCEW-UDP; Mass Economics Analysis, 2019

North Riverfront

Located in the north-east along the River the northern edge of the city’s boundary, the North Riverfront employment center is mostly industrial (42%) and 25% of the area is vacant. 13% of these vacant parcels are larger than 5 acres. Compared to other employment centers, North Riverfront has the largest average parcel size of 3.2 acres. North Broadway and Hall Street serve as the main arteries dividing this employment center and the city’s residential fabric.

Despite being the largest employment center in terms of acreage, the North Riverfront has the lowest job density (1.4 jobs per acre), with about 2,700 employees working on 1,950 acres.²⁶ TDL and real estate and construction-related activities are the key industries in this area, but there is also a sizable presence of automobile products and services with a few notable scrap yards. There are many freight and auto-related businesses with active rail crisscrossing the area.

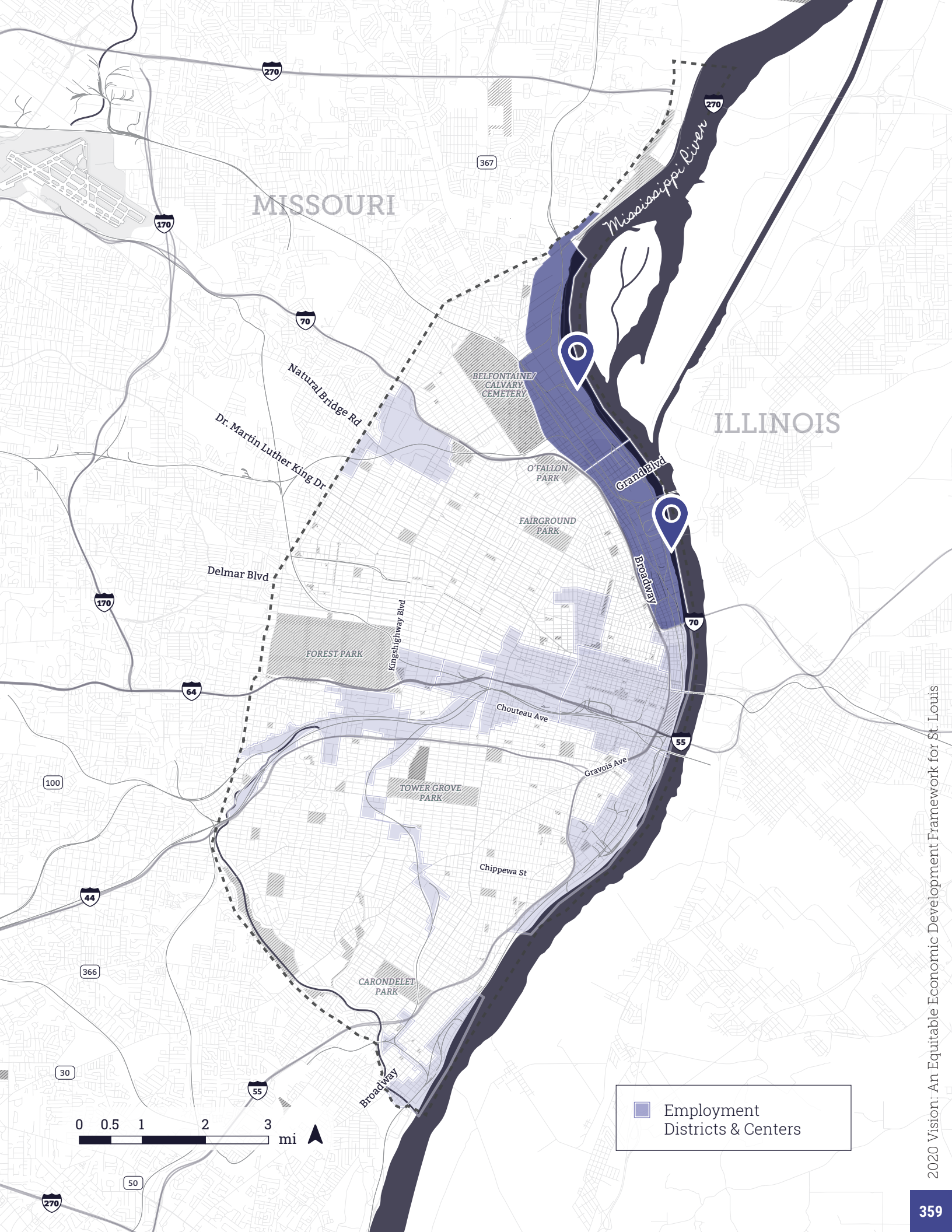
26 YTS data; QCEW-UDP; Mass Economics Analysis, 2019

District Vision

The vision as documented in the 2011 Land Use Plan states that these areas will:

“attract high-quality jobs by targeting emerging industries and innovative businesses; fully leverage its central location in the region and access to river, rail and highway infrastructure; significantly increase the quantity and diversity of products shipped through the area; provide quality services and unique amenities to remain competitive with emerging inter-modal hubs; leverage the environmental, and recreational assets of the Confluence Greenway Mississippi River corridor to add value for area businesses, improve conditions for employees and provide compatible uses for recreational users and; be a sustainable business community through improvements and initiatives that demonstrate a commitment to the triple bottom line: the economic, environmental and social value they bring to the local area and St. Louis region.”

Given the research conducted on clusters and the economy during this process, this vision remains relevant with the added emphasis that the Near North- and North Riverfront represent the primary opportunity in the city to boost employment in transportation, distribution, and logistics (TDL). The riverfront offers a confluence of highway, rail and port facilities that is the foundation for increased activity in this cluster. Food and beverage processing could also expand along the river, capitalizing on agricultural traffic along the river, vacant and under-utilized land, and proximity to infrastructure.



NEAR NORTH RIVERFRONT

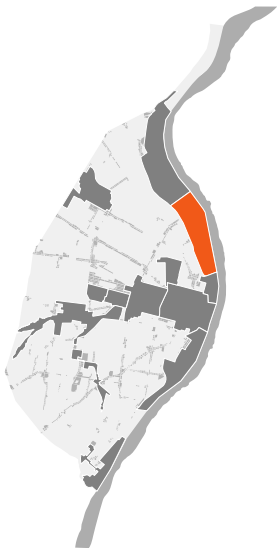
“I would describe Near North Riverfront as...”

A working riverfront because of all the businesses located there and seeing their backyard.
In need of economic development because it is very close to the downtown and the river.
Industrious because of the historic warehouses, historic manufacturing facilities.
Underutilized because of the historic buildings that could be repurposed for residential, retail, and/or manufacturing.

Source: July Open House public input

District Profile	
Size (acres)	1,370
Employees	4,400
Job Density	3.2
% Industrial (acres)	44%
% Vacant (acres)	19%
Number of Businesses	180
Largest Employment Clusters	
Clusters	Employees
Chemicals and Metals	1,100
Transportation, Distribution, and Logistics	810
Food And Beverage Manufacturing	590
Agricultural Inputs and Services	260
Local Industrial Products and Services	230
Largest Businesses	
Duke Manufacturing Co.	
Proctor & Gamble MFG Co.	
Performance Foodservice	
Elantas PDG Inc.	
Middendorf Meat	
Noteworthy	
<ul style="list-style-type: none">• The Near North District contains over 1/3 of the City's jobs in Downstream Chemical Products and over 40% of the City's jobs in Biopharmaceuticals and Production Technology / Heavy Machinery• Of the top industries, almost 2/3 of the jobs require at least some college and on-the-job training.• The job density is very low at 3.4 jobs per acre but this is impacted by vacant properties and existing sewer / water treatment facilities.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



Near North Riverfront

Source: City of St. Louis, Interface Studio



Figure N3R-1. Neare North Riverfront aerial map

NORTH RIVERFRONT

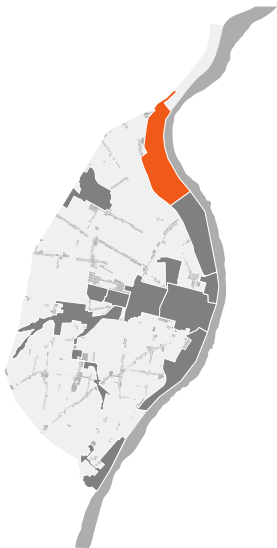
“I would describe North Riverfront as...”

Dangerous because of crime.

Source: July Open House public input

District Profile	
Size (acres)	1,950
Employees	2,700
Job Density	1.4
% Industrial (acres)	42%
% Vacant (acres)	25%
Number of Businesses	140
Largest Employment Clusters	
Clusters	Employees
Transportation, Distribution, and Logistics	1,300
Chemicals and Metals	320
Automotive and Motor Vehicle Services	300
Real Estate, Construction, and Development	190
Plastics	80
Largest Businesses	
Ups Freight	
XPO Enterprise Services Inc.	
Dial Corp.	
ABFFreight System Inc.	
Truck Centers	
Waste Management	
Noteworthy	
<ul style="list-style-type: none">• All of the top industries in the North District except Chemical Products have declined in employment since 2010.• 40-45% of jobs are accessible to those with a high school diploma.• The North Riverfront has the lowest job density in the City at 1.4 jobs per acre.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



North Riverfront

Source: City of St. Louis, Interface Studio

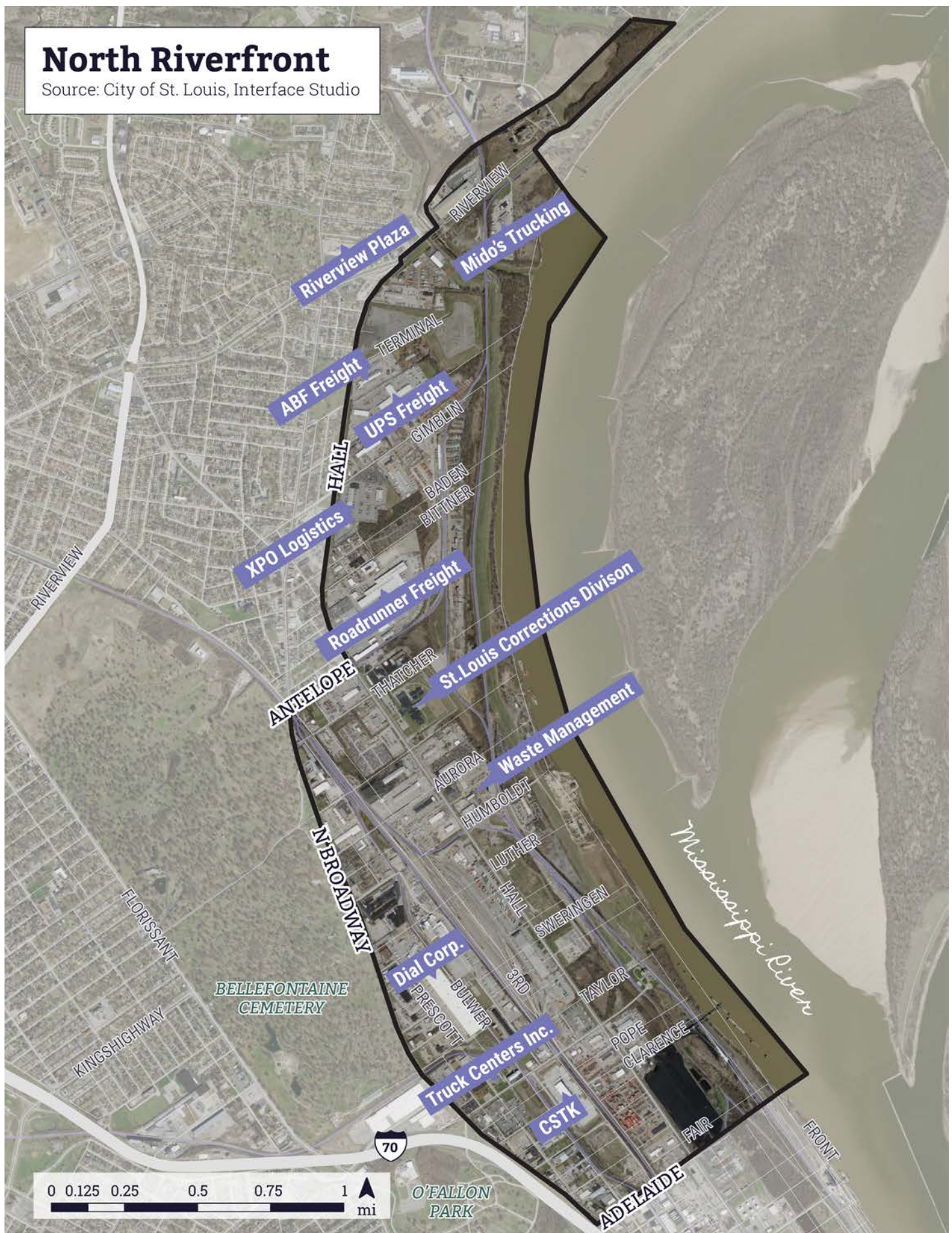


Figure N3R-2. North Riverfront aerial map

Strategies and Action Items

The following strategies reflect critical strategies from the 2011 Plan to support key cluster growth and suggested changes to that plan in light of recent research.

Strategy
1

Improve North Broadway, Hall and targeted cross streets as front doors to the districts

The Near North and North Riverfront employment centers are tucked between I-70 and the Mississippi River. Activity is most visible from I-70 (in specific locations), bridges and along N. Broadway and Hall Street that act as the primary north-south connector streets. To help attract private investment and employees, it is important that the area presents a good first impression. Front door improvements should be focused on N. Broadway, Hall and targeted east-west connector streets and should include: new streetscape, lighting and façade improvements along N. Broadway; landscaping and tree plantings on primary neighborhood connector streets; and wayfinding in critical locations to brand the district and promote local businesses.

PRECEDENT

MURAL

St. Louis, MO: S Broadway

EYES OPEN by Peat Wollaeger

<https://news.stlpublicradio.org/post/carondelet-neighborhood-sees-potential-public-art#stream/0>

Action Item #: <u>N3R-1.1</u>	Revisit design documents for N. Broadway and identify locations for wayfinding and tree plantings on other front door streets
Leader	Board of Public Service, Forestry, SLDC
Potential Partners	Green City Coalition, Parks Dept., Planning & Urban Design Agency
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local Aldermen, transportation grant funding, bond issue
Goal/s	Completed schematic design
Tracking Progress	Total public and private investment along each corridor
Action Item #: <u>N3R-1.2</u>	Activate blank façades along N. Broadway
Leader	SLDC
Potential Partners	Regional Arts Commission, arts organizations, local businesses
Start Time	Year 1
Duration	2 years
Effort to Implement	High
Potential Funding	Arts grant, business contributions
Goal/s	New, visible public art
Tracking Progress	Installed art locations, façade-improved storefront locations

Strategy 2

Vacate targeted streets to create larger sites and create value

TDL and many modern manufacturing businesses require large sites to operate. Part of the difficulty in acquiring larger sites along the riverfront is the collection of smaller properties that are broken up by short blocks and dead-ends, often near or off of N. Broadway. Vacating streets that are not important thoroughfares to nearby communities or the sole access points to existing businesses can create value 1) directly for the city by the creation of acres of newly developable land – on which it can collect tax revenue after it is privately developed as part of a site assembly; 2) by giving the city a “toe-hold” in a site assembly, which can be given away for free or at a discount to incentivize development and/or to extract concessions from developers – e.g., requiring X hundred jobs on the site within Y number of years; and 3) by connecting formerly separate parcels to form a larger or less irregularly shaped, more readily developable site assembly. Once the street is dissolved and the potential assembly is identified, the site could then be included as one of many in a public, competitive land assembly RFP process.

Action Item #: <u>N3R-2.1</u>	Confirm which streets to vacate and provide notice to adjacent property owners – coordinate with land assembly process
Leader	LRA, SLDC
Potential Partners	Board of Aldermen, North Broadway Business Association, Planning & Urban Design Agency, Streets Dept.
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local aldermen
Goal/s	Completed schematic design
Tracking Progress	Total linear feet vacated, number of new development opportunities created



Intersection of N Broadway and Halls Ferry Rd.

**Strategy
3**

Assemble & market key sites for industrial development

There are 93 opportunity sites within the Near North- and North Riverfront employment centers. 26 of these are larger than 10 acres, 10 are larger than 20 acres, and 5 are larger than 30 acres (all in the North Riverfront area). While there are some sites that are largely under public ownership, the majority of acquisition and assembly will be through private owners. These sites are critical to the future of TDL activity in the city, will require physical integration of rail infrastructure, and need careful research to determine the barriers and real cost to assemble.

Action Item #: <u>N3R-3.1</u>	Conduct research and preliminary outreach on parcels and parcel owners within potential assemblies to assess viability, timing, and necessary actions to help enable site development
Leader	SLDC
Potential Partners	Planning & Urban Design Agency, Port Authority
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	Economic Development Tax
Goal/s	Collect necessary information to make decision on go/no-go for site assembly and take steps towards supporting development (e.g., parcel acquisition, release of competitive land assembly RFP)
Tracking Progress	Number of new businesses, total number of employees, amount invested

Strategy 4

Focus landscaping and tree planting around I-70

The Near North and North Riverfront employment centers are largely contained and separated from nearby residential communities by I-70. Currently, I-70 creates a harsh edge to both the employment centers and the neighborhoods. It is also the first impression many visitors have to St. Louis arriving from the airport. Portions of the west side of I-70 are already planted with trees but there are opportunities to take this further and explore using excess space on frontage roads and in spaces between N. Broadway and the highway to plant new trees and upgrade landscaping. A dense tree canopy will help to provide a transformed corridor to the riverfront and city but also help to address air quality issues from highway traffic.

Action Item #: <u>N3R-4.1</u>	Identify land available for greening and coordinate with MODOT on possible options
Leader	City
Potential Partners	Forest Releaf of Missouri, Missouri Department of Conservation, MODOT, SLDC
Start Time	Year 2
Duration	3-5 years
Effort to Implement	High
Potential Funding	East-West Gateway COG, local aldermen, SLDC
Goal/s	A renewed and green city entrance
Tracking Progress	Total investment, tree canopy coverage around I-70

**Strategy
5**

Change use recommendations for the “Market District” district

The 2011 Plan identified a number of sub-districts that all provide land use recommendations. All of the sub-district recommendations align with the vision of the Near North- and North Riverfront except for the recommendation that residential uses be allowed within the Market Street district. Given that housing can threaten the economics of nearby industrial and commercial land, residential should be removed as an allowable use.

Action Item #: <u>N3R-5.1</u>	Add an addendum to the 2011 Plan
Leader	City
Potential Partners	SLDC
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	N/A
Goal/s	Edited NRCC Plan
Tracking Progress	NRCC Plan addendum process

Strategy 6

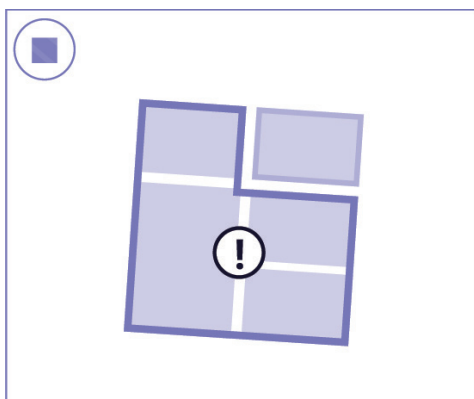
Create a North Riverfront Community Improvement District (CID)

The 2011 Plan placed responsibility for implementation onto a proposed local CID that could guide activities. A group of property and business owners have continued to meet but a formal CID has yet to be established. SLDC and the Port Authority should collaborate to help create this CID which will likely require organizations with staff and capacity to rally property owners, including those owning rail infrastructure, to participate. This will likely require hiring staff internal to SLDC to assist in building capacity across different districts and centers.

Action Item #: <u>N3R-6.1</u>	Develop a fact sheet of potential revenue and benefits of a CID
Leader	Port Authority, SLDC
Potential Partners	North Broadway Business Association, Planning & Urban Design Agency
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	N/A
Goal/s	Make a clear case for the benefits of a CID
Tracking Progress	Funding sources, anticipated expenses and improvements
Action Item #: <u>N3R-6.2</u>	Conduct outreach to property owners
Leader	Port Authority, SLDC
Potential Partners	North Broadway Business Association, Terminal Railroad Association
Start Time	Year 1
Duration	1 year
Effort to Implement	Medium
Potential Funding	N/A
Goal/s	Identify specific CID boundaries based upon property owner participation
Tracking Progress	List of property owners and businesses

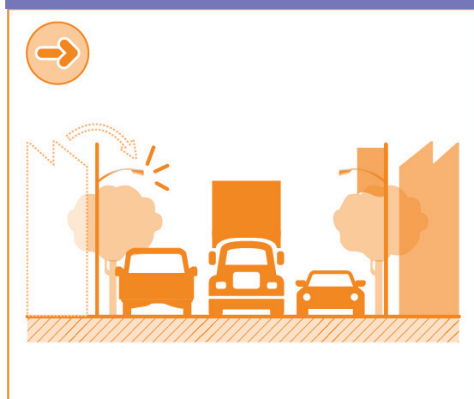


Figure N3R-3. Near North Riverfront potential strategy



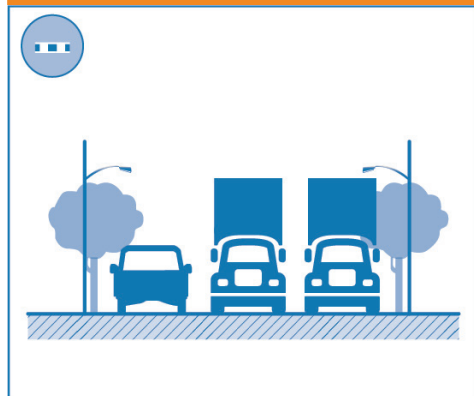
Potential Opportunity & Investment

Assemble land for potential development on a collection of multiple parcels that are currently vacant and/or underutilized.



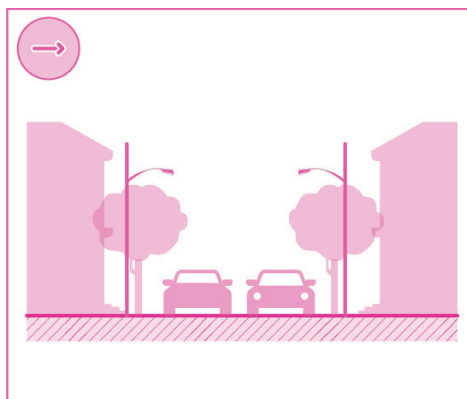
Front Door

Front Door functions as main entrance to a district. Potential improvements include lighting, wayfinding, streetscape, façade improvements, landscaping and street surface upgrades.



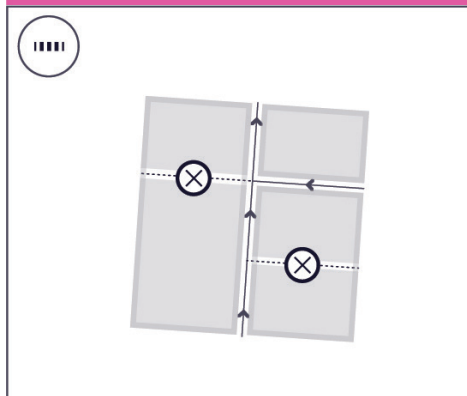
Access Street

Access Streets are intended to serve the needs of existing and new businesses and designed to accommodate truck access.



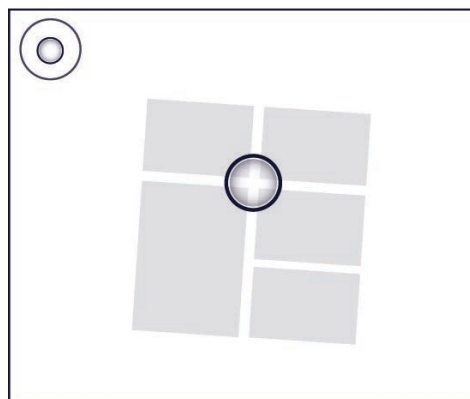
Neighborhood Connector

Designed to establish clear connections between employment districts and adjacent neighborhoods. Potential improvements include wayfinding and landscaping.



Street Closure

Existing streets are closed for ease of access and efficient traffic flow.



Intersection Upgrade

Intersections are upgraded with crosswalks and entryway signage.



Trail/Bike Path (e.g. Brickline Greenway)

Provide pedestrian and/or bike-friendly infrastructure. These corridors serve as a part of Great Rivers Greenway trail network and includes the proposed Brickline Greenway alignment.

Figure N3R-4. Proposed improvements in Near North Riverfront

North Riverfront Potential Strategy

Source: Interface Studio, Mass Economics, City of St. Louis

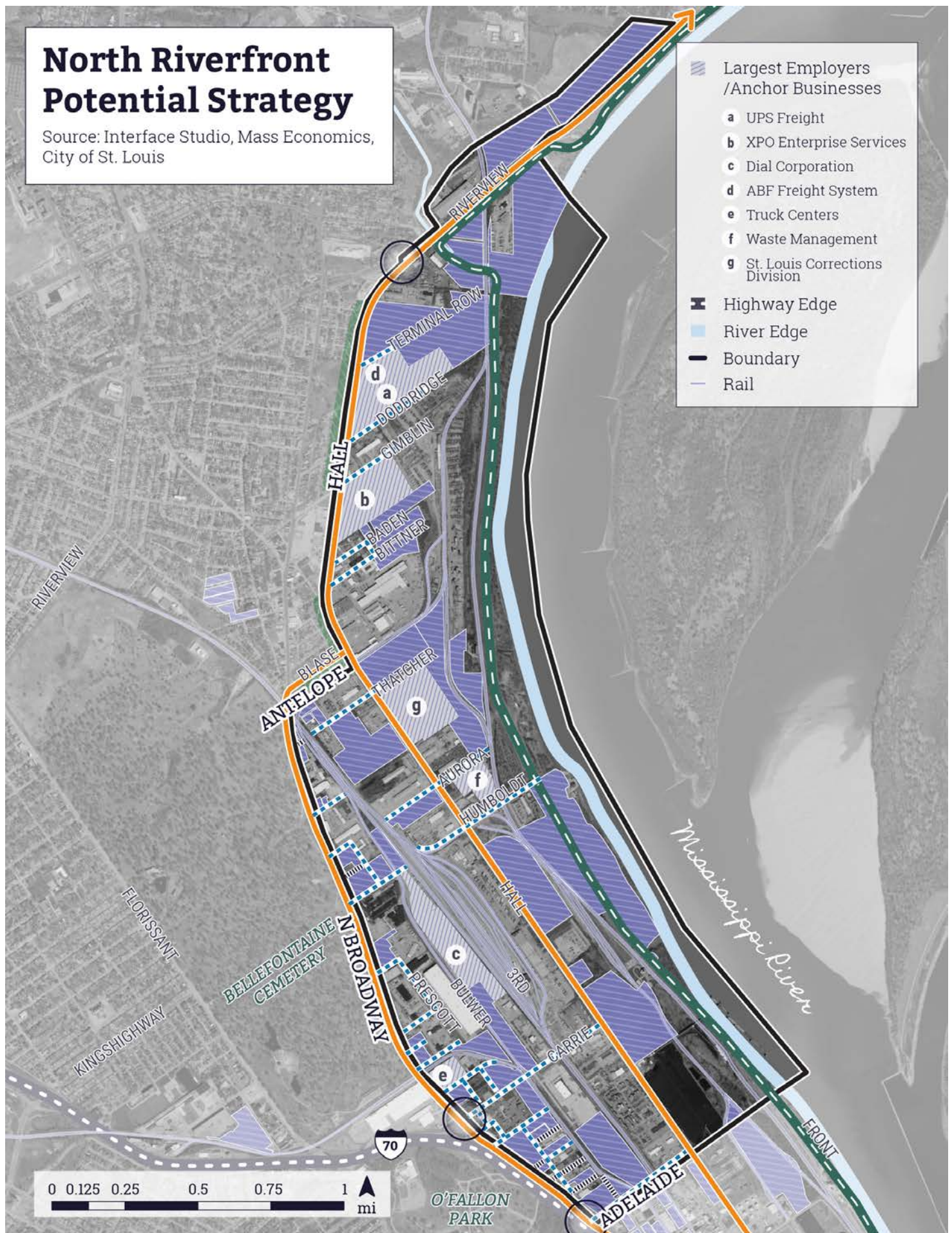


Figure N3R-5. North Riverfront potential strategy

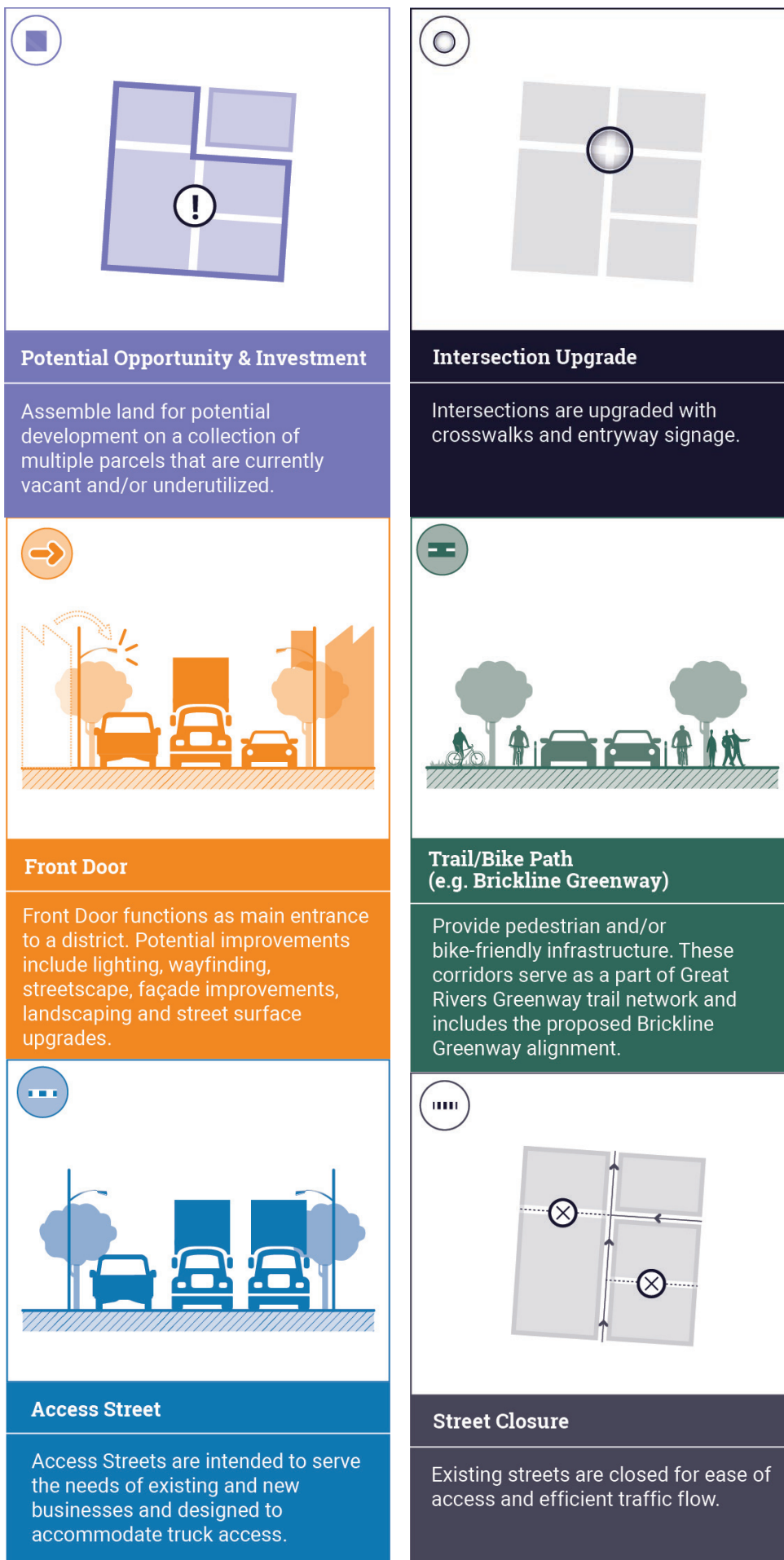


Figure N3R-6. Proposed improvements in North Riverfront

EMPLOYMENT CENTERS

ROUTE 66 AND SOUTH ST. LOUIS

ROUTE 66 AND SOUTH ST. LOUIS EMPLOYMENT CENTERS WILL SERVE AS VIBRANT CENTERS FOR URBAN MANUFACTURING, CONSTRUCTION, B2B SERVICES AND COMMERCIAL OFFICES AND RETAIL.

Overview

The Route 66 and South St. Louis employment centers share many characteristics including close proximity to surrounding communities. They are both a mix of industrial and commercial uses that follow freight rail lines and have much less vacancy than other historically industrial areas. Due to their similarities, Route 66 and South St. Louis are discussed jointly.

Route 66 Area

The Route 66 Area employment center is surrounded by dense residential neighborhoods south of Forest Park and west of Tower Grove Park. 32% of the land is used as industrial and only 4% of parcels are vacant. Compared to other employment centers, Route 66 Area has the lowest vacancy rate.

Route 66 Area includes 10,300 employees in 1,270 acres - the highest job density (8.1 jobs per acre) of all of the employment centers.²⁷ Key industries of the Route 66 Area are largely industrial (metals, chemicals, real estate and construction, distribution) and is home to about a fifth of the city's urban manufacturers. There is also a significant presence of community and civic organizations.

South St. Louis

South St. Louis is located just south of Tower Grove Park and includes a few of the city's main commercial corridors, including Kingshighway, Gravois Avenue, and Chippewa Street. About 56% of South St. Louis' land is industrial and 10% is vacant. 3% of the vacant parcels are larger than 5 acres and the average size of a parcel is 1.6 acres.

About 1,400 employees work in this 300-acre area (4.8 jobs/acre).²⁸ Real Estate & Construction and urban manufacturing (which makes up almost one third of jobs) are the key industries of this employment center.

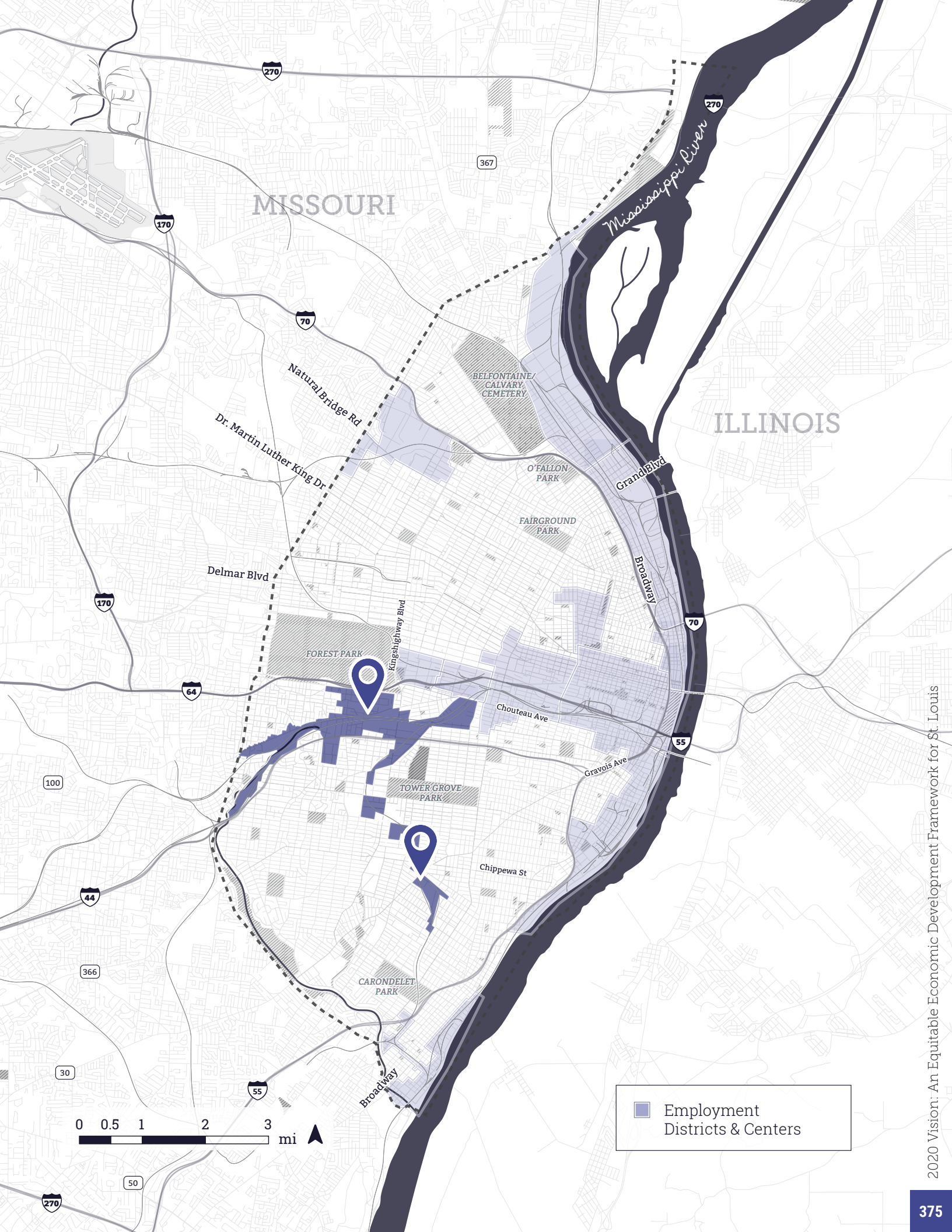
District Vision

Route 66 and South St. Louis employment centers will serve as vibrant centers for urban manufacturing, construction, B2B services and commercial offices and retail. These jobs centers are integrated into the fabric of surrounding communities and provide quality jobs for residents. Approximately one fifth of the city's urban manufacturing employment is located in the Route 66 employment center – the highest share among the employment districts and employment centers. The South employment center has the highest percent of total jobs in urban manufacturing (just under one third of its jobs are in urban manufacturing).²⁹ Each employment center offers opportunities for redevelopment and new employment to reinforce their important role in the city's economy.

²⁹ Source: YTS, 2018; Mass Economics analysis

²⁷ YTS data; QCEW-UDP; Mass Economics Analysis, 2019

²⁸ YTS data; QCEW-UDP; Mass Economics Analysis, 2019



ROUTE 66 AREA

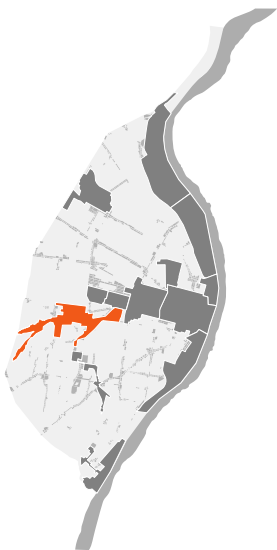
“I would describe Route 66 Area as...”

Challenging because it is convenient to live, with good housing stock and access to resources, but housing costs increase while wages do not.
Changing because of lots of renovation and commercial investment.
Nice because of food and daytime stuff.
Residential because of the amount of homes and relative lack of access to public transit.

Source: July Open House public input

District Profile	
Size (acres)	1,270
Employees	10,300
Job Density	8.1
% Industrial (acres)	32%
% Vacant (acres)	4%
Number of Businesses	740
Largest Employment Clusters	
Clusters	Employees
Transportation, Distribution, and Logistics	1,900
Chemicals and Metals	1,300
Real Estate, Construction, and Development	1,100
Tourism	930
Food and Beverage Manufacturing	810
Largest Businesses	
Cielo LLC	
Willert Home Products Inc.	
Catering St. Louis Inc	
Weissman's Designs For Dance	
Daniel & Henry Co.	
Tech Electronics Inc.	
Humane Society Of Missouri	
Noteworthy	
<ul style="list-style-type: none">The Route 66 Area employment center is surrounded by dense residential neighborhoods south of Forest Park and west of Tower Grove Park.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



Route 66 Area

Source: City of St. Louis, Interface Studio



Figure R66-1. Route 66 Area aerial map

SOUTH ST. LOUIS

“I would describe South St. Louis as...”

Booming because it is vibrant, diverse, densely populated, and full of delicious food.

Diverse because it has a variety of restaurant/bar, entertainment, and recreation options

Diverse because there are lots of immigrants, Black, White, Asian, etc. I love it! Feels like a big city.

Great because it has a good mix of diversity of people and income.

Great because it's walkable.

International because of all the people I meet and work with that are from various other countries and cannot speak the prominent language of the states.

Stable because there is new investment and business growth in pockets around my neighborhood.

Vibrant because it's diverse, foodie, active, mixed income and affordable.

Vibrant because of the walkability and diversity of people, thought, and businesses.

Source: July Open House public input

District Profile	
Size (acres)	300
Employees	1,400
Job Density	4.5
% Industrial (acres)	56%
% Vacant (acres)	10%
Number of Businesses	90
Largest Employment Clusters	
Clusters	Employees
Real Estate, Construction, and Development	330
Chemicals and Metals	260
Transportation, Distribution, and Logistics	210
Food and Beverage Manufacturing	90
Downstream Metal Products	80
Largest Businesses	
GMP Metal Products Co.	
David Sherman Inc.	
Guarantee Electrical Co.	
Lyon Sheet Metal Works	
Precoat Metals	
Noteworthy	
<ul style="list-style-type: none">South St. Louis is located just south of Tower Grove Park and includes a few of the city's main commercial corridors, including Kingshighway, Gravois Avenue, and Chippewa Street.	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio

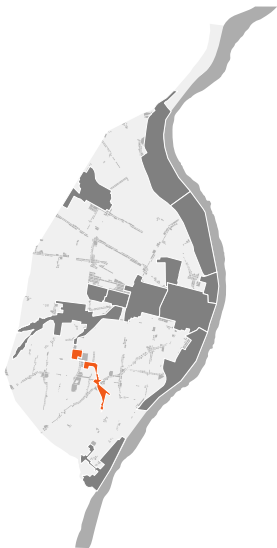




Figure R66-2. South St. Louis aerial map

Strategies and Action Items

Strategy 1

Improve Manchester and targeted cross streets as front doors to Route 66

Both employment centers are irregular, following freight rail lines and are accessed from many cross streets. Manchester Avenue is the one exception in Route 66 that provides access across many different industrial and commercial sites across the employment center. To make a good first impression, “front door” improvements should be focused on Manchester Avenue, which will help to connect to the energy along the Grove. The opportunities include wayfinding, façade improvements, public art and greening along the excess space adjacent to the rail.

Action Item #: <u>R66-1.1</u>	Develop design strategies and an action plan for Manchester Ave.
Leader	Park Central
Potential Partners	Planning & Urban Design Agency, SLDC
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local aldermen, SLDC
Goal/s	Completed improvement plan
Tracking Progress	Total public and private investment along Manchester
Action Item #: <u>R66-1.2</u>	Activate blank façades along Manchester
Leader	SLDC
Potential Partners	Regional Arts Commission, arts organizations, local businesses, SLDC
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Arts grant, business contributions
Goal/s	New, visible public art
Tracking Progress	Installed art locations, façade-improved storefront locations

PRECEDENT

STOREFRONT MURAL

San Francisco, CA



Minnesota Street Project
<https://www.properhotel.com/hotels/san-francisco/neighborhood/proper-culture/minnesota-street-project/>



Strategy
2

Integrate new signage to promote each district

These legacy industrial and commercial districts are difficult to define. Unlike the North Riverfront or Downtown, they lack a clearly identifiable geography and are often overlooked. The names themselves – Route 66 and South St. Louis – emerged during this project, as they did not have recognized designations. To help signal to the market that these are working industrial and commercial areas that offer opportunities for business growth, new wayfinding is necessary to help brand and promote local businesses.

Action Item #: <u>R66-2.1</u>	Contract for wayfinding design services
Leader	SLDC
Potential Partners	City
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local aldermen, SLDC
Goal/s	Completed wayfinding and branding action plan
Tracking Progress	Coordinate with design strategies and action plans

PRECEDENT

WAYFINDING

Melbourne, Australia



Metropolitan Fire Brigade
https://drivenxdesign.com/mel14/project.asp?ID=13619&Category_ID=5989



PRECEDENT

WAYFINDING

New York, NY



New York Numbers
<https://www.instagram.com/p/1eodTEpyEk/>



Strategy 3

Improve key intersections

Due to the close proximity of homes and industrial and commercial businesses, the streets are serving many demands from pedestrian crossing to truck traffic. Intersections are key pinch points that bring all of these demands together. Priority intersections include:

Route 66

- › Kingshighway & Shaw
- › Manchester & Macklind
- › Manchester & S Kingshighway
- › S Vandeventer & Tower Grove
- › S Vandeventer & Chouteau

South St. Louis

(This area is tightly surrounded by residential uses so there are many entry points and key intersections.)

- › Kemper & S Kingshighway
- › Fyler & Morganford
- › Fairview & Morganford
- › Maury & Oleatha
- › Alfred & Oleatha
- › Meramec & Chippewa
- › Chippewa, Grand, & Gravois
- › Bingham & Gustine
- › Itaska & Gustine

Action Item #: <u>R66-3.1</u>	Identify and design improvements for key intersections around Route 66 and South St. Louis
Leader	City
Potential Partners	Local businesses and residents, SLDC
Start Time	TBD
Duration	3-5 years
Effort to Implement	High
Potential Funding	City
Goal/s	Targeted intersection improvements
Tracking Progress	Total public and private investment for each intersection



Manchester & S Kingshighway



Chippewa & Gravois

Strategy 4

Assemble and market key sites for industrial development

There are 25 opportunity sites within the Route 66 and South St. Louis employment centers. Only 6 of these sites are between 5 and 10 acres. Except for one publicly-owned site in Route 66, all of the acquisition and assembly will be through private owners.

Action Item #: <u>R66-4.1</u>	Conduct research and preliminary outreach on parcels and parcel owners within potential assemblies to assess viability, timing, and necessary actions to help enable site development
Leader	SLDC
Potential Partners	Planning & Urban Design Agency, Port Authority
Start Time	Year 1
Duration	1 year
Effort to Implement	Medium
Potential Funding	TBD
Goal/s	Collect necessary information to make decision on go/no-go for site assembly and take steps towards supporting development (e.g., parcel acquisition, release of competitive land assembly RFP)
Tracking Progress	Number of new businesses, total number of employees, amount invested

Strategy 5

Protect industrial use

Both employment centers are comprised of smaller districts stretched around rail and major roads. Some of these subdistricts are commercial in use, some include concentrations of automobile-oriented retail. Others are clearly industrial in nature. To ensure these industrial pockets remain dedicated to non-retail business, seek zoning protections to limit non-industrial uses. As shown in the accompanying map, these areas include: Vandeventer west to Hampton Avenue and between I-44 and the rail in Route 66; and three locations in South St. Louis – 2 on either side of Chippewa and one to the west of S. Kingshighway Blvd.

Action Item #: <u>R66-5.1</u>	Change zoning to protect select industrial pockets of activity
Leader	City
Potential Partners	Local businesses, SLDC
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	Aldermen
Goal/s	Rezoning
Tracking Progress	Zoning update

Route 66 Area Potential Strategy

Source: Interface Studio, Mass Economics,
City of St. Louis

- Boundary
- Rail
- Protected Industrial
Use Area

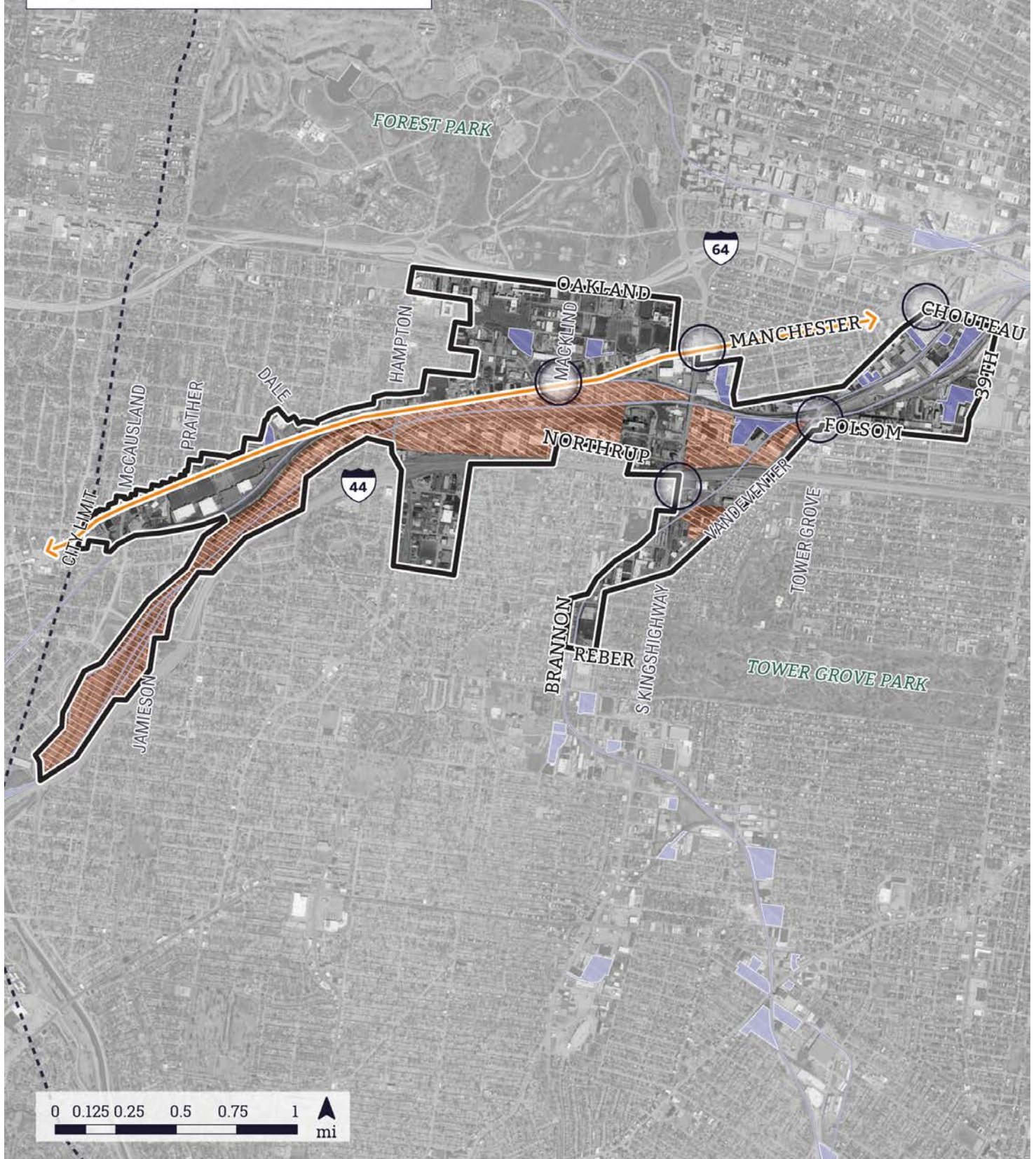


Figure R66-3. Route 66 Area potential strategy

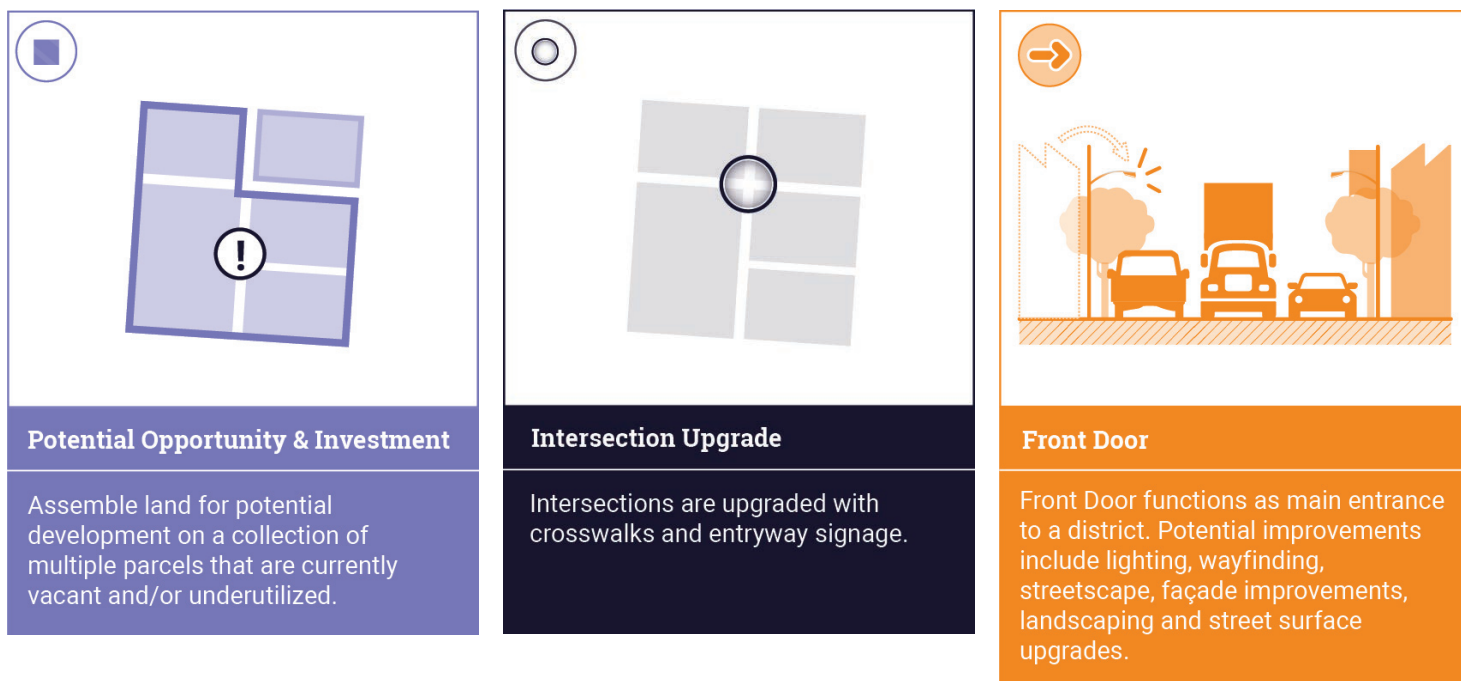


Figure R66-4. Proposed improvements in Route 66 Area

South St. Louis Potential Strategy

Source: Interface Studio, Mass Economics, City of St. Louis



Figure R66-5. South St. Louis potential strategy

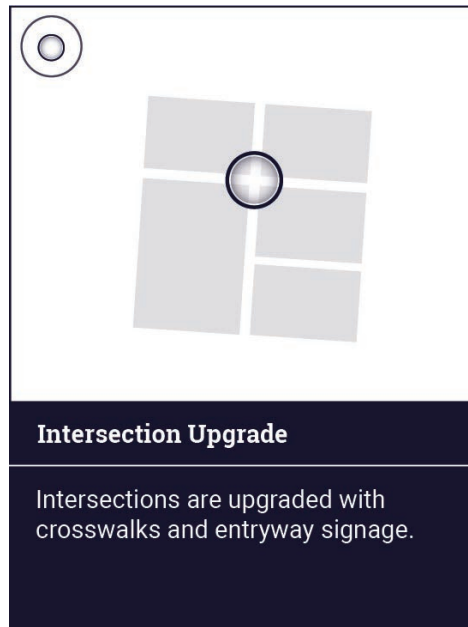
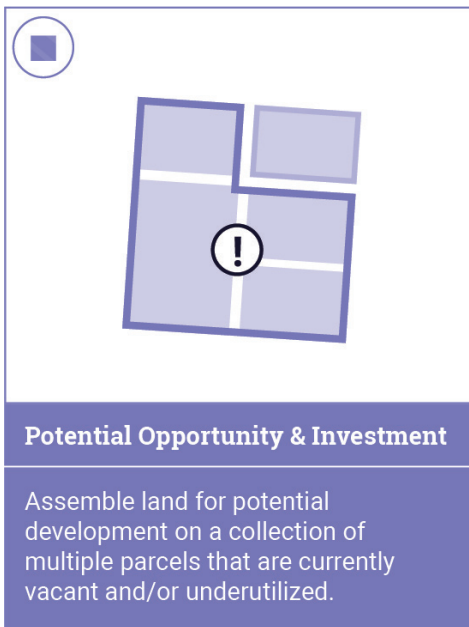


Figure R66-6. Proposed improvements in South St. Louis

EMPLOYMENT CENTERS

SOUTH RIVERFRONT / KOSCIUSKO

Overview

The South Riverfront and Kosciusko employment center is located south of the Downtown Core and is bounded by Mississippi River, Dakota Street, Chouteau Avenue, Broadway, and Interstate 55 and 44. 52% of the land is used as industrial and 10% of the area's land is identified as vacant. The area is known as the home to Anheuser-Busch, which occupies a large concentration of land. The district includes additional corporate campuses including Millipore-Sigma, as well as the existing NGA site. The move of NGA to a site in North St. Louis will almost certainly mean a decline in employment along the South Riverfront.

South Riverfront and Kosciusko is 1,130 acres and includes 6,200 employees.³⁰ This area has the highest job density (5.5 jobs/acre) of riverfront employment centers but this number remains low for comparable industrial districts across the country. Food and beverage processing and manufacturing and TDL are key industries, but there remains some vacancy that could be redeveloped to support expansion of industrial and commercial activities.

30 YTS data; QCEW-UDP; Mass Economics Analysis, 2019

District Vision

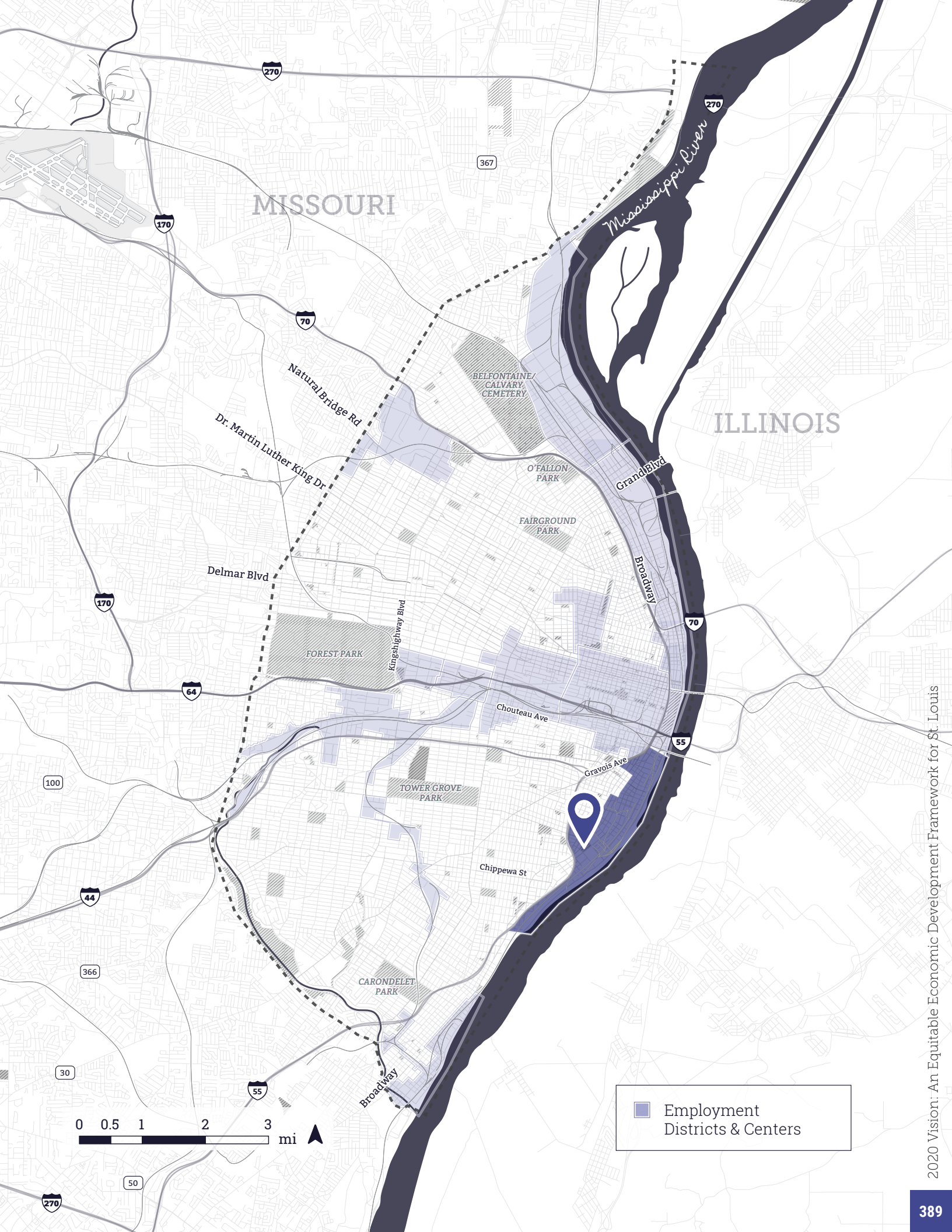
South Riverfront and Kosciusko will build on its legacy of food manufacturing businesses and proximity to Souland Market to become the city's capital of food and beverage manufacturing. Freight rail and port facilities will continue to make the South Riverfront attractive for transportation, logistics, and distribution (TDL) and the area will continue to expand jobs in local construction and business services. S. Broadway between Geyer and Miller Streets is an excellent location for smaller commercial and industrial businesses, as well as retail and restaurants to serve local employees and residents. Investment in this area will help to provide job and business opportunities for the adjacent Dutchtown community that suffers from high poverty and unemployment rates.



Budwesier on S Broadway



Kinder Morgan DCS on 1st Street



MISSOURI

ILLINOIS

Mississippi River

Natural Bridge Rd

Dr. Martin Luther King Dr

Delmar Blvd

FOREST PARK

Kingshighway Blvd

TOWER GROVE PARK

Chippewa St

CARONDELET PARK

Broadway

O'FALLON PARK

FAIRGROUND PARK

Grand Blvd

Broadway

Chouteau Ave

Gravois Ave

Employment Districts & Centers

0 0.5 1 2 3 mi

SOUTH RIVERFRONT/KOSCIUSKO

“I would describe South Riverfront/Kosciusko as...”

Friendly because of the park and families/housing.

Industrial because of the railroad and industry.

Intimidating because there is so much vacant and abandoned property that is not being maintained.

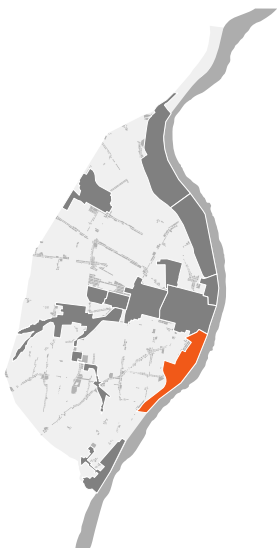
Surprising because it seems like so much good is hidden in this district amidst the “working” industrial portion.

Vacant because there are too many vacant properties.

Source: July Open House public input

District Profile	
Size (acres)	1,130
Employees	6,200
Job Density	5.5
% Industrial (acres)	52%
% Vacant (acres)	10%
Number of Businesses	130
Largest Employment Clusters	
Clusters	Employees
Food and Beverage Manufacturing	2,200
Transportation, Distribution, and Logistics	1,400
Business and Financial Services	820
Local Commercial Services	470
Real Estate, Construction, and Development	390
Largest Businesses	
Anheuser-Busch (Budweiser Plant)	
YRC Freight	
Nooter Construction Co.	
Metal Container Corp.	
Patty Long Catering Inc.	
Clean The Uniform Co.	
Noteworthy	
<ul style="list-style-type: none"> Approximately 40% of the jobs in the top clusters (except Business Services) are available to residents with a high school diploma or less. Over 50% of the primary jobs (except Business Services) require only limited on-the-job-training and approximately 90% of the jobs do not require prior experience in that field. The South Riverfront has a very low job density of about 4 jobs per acre and thousands of jobs are about to relocate to the new NGA facility in North St. Louis. 	

Source: YTS data; QCEW-UDP; Mass Economics, Interface Studio



South Riverfront / Kosciusko

Source: City of St. Louis, Interface Studio



Figure SRK-1. South Riverfront/Kosciusko aerial map

Strategies and Action Items

Strategy 1

Improve South Broadway and targeted cross streets as front doors to the districts

To help attract private investment and employees, it is important that the South Riverfront presents a good first impression. Front door improvements should be focused on S. Broadway/7th Blvd. and target east-west connector streets. The opportunities include: additional greening, lighting and façade improvements along S. Broadway; landscaping and tree plantings on primary neighborhood connector streets; and wayfinding in critical locations to further brand the district and promote local businesses. Improved crossings and signage at Soulard Market are particularly important to help establish stronger connections to the area's wholesalers that are sometimes open to the public.

Action Item #: <u>SRK-1.1</u>	Revisit and expand the action plan for S. Broadway and identify locations for wayfinding and tree plantings on other front door streets
Leader	Board of Public Service
Potential Partners	Planning & Urban Design Agency, SLDC
Start Time	Year 2
Duration	2 years
Effort to Implement	Medium
Potential Funding	Local aldermen, SLDC
Goal/s	Completed action / improvement plan
Tracking Progress	Total public and private investment along each corridor



S Broadway vacant storefronts



Soulard Farmers Market

Strategy 2

Assemble & market key sites for industrial development

There are 15 opportunity sites within South Riverfront & Kosciusko. Only 3 of these sites are over 10 acres but this does not include potential future opportunities with respect to the NGA campus which is under federal authority. There are no publicly-owned sites in this center.

Action Item #: <u>SRK-2.1</u>	Conduct research and preliminary outreach on parcels and parcel owners within potential assemblies to assess viability, timing, and necessary actions to help enable site development
Leader	SLDC
Potential Partners	Planning & Urban Design Agency, Port Authority
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	N/A
Goal/s	Collect necessary information to make decision on go/no-go for site assembly and take steps towards supporting development (e.g., parcel acquisition, release of competitive land assembly RFP)
Tracking Progress	Number of new businesses, total number of employees, amount invested

Strategy 3

Create a local business association

Due to freight rail and some large campuses, the South Riverfront is fragmented. However, as expressed by the district's business owners, there are common challenges including blight, aging infrastructure, and employee attraction.³¹ A local business association would help to coordinate and prioritize local needs and advocate for the district with one voice. Completing a redevelopment plan for South Riverfront is the opportunity to engage and recruit key business and property owners to the table as a more formally connected association. The association should meet quarterly and establish a primary point of contact with SLDC, local aldermen and partners.

Action Item #: <u>SRK-3.1</u>	Develop clear roles and a responsibilities checklist for a business association
Leader	SLDC
Potential Partners	TBD
Start Time	Year 1
Duration	1 year
Effort to Implement	Medium
Potential Funding	N/A
Goal/s	Empower a local group of business and property owners to partner with SLDC
Tracking Progress	Updated list of property owners and businesses

31 Project interviews and roundtables

South Riverfront / Kosciusko Potential Strategy

Source: Interface Studio, Mass Economics, City of St. Louis

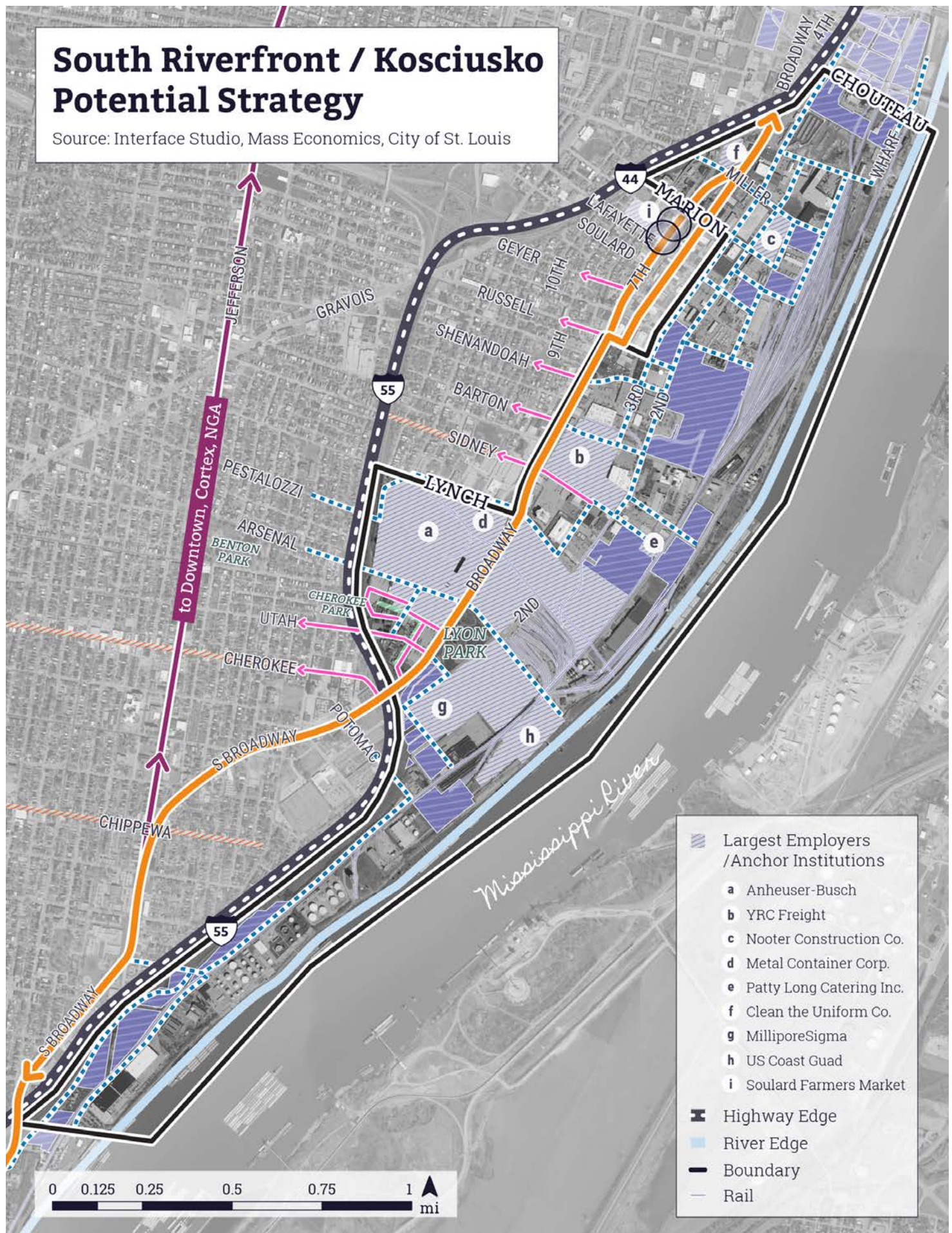
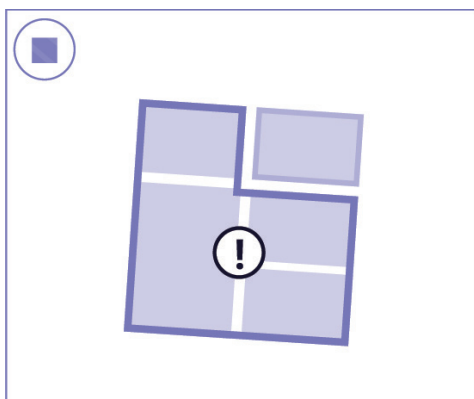
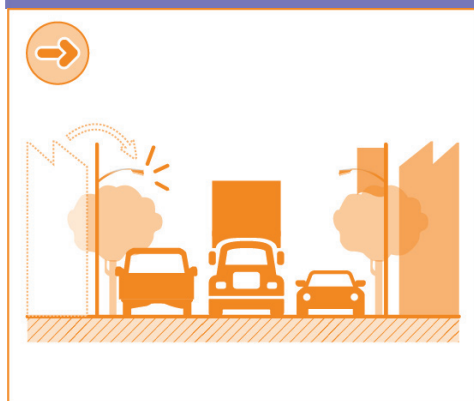


Figure SRK-2. South Riverfront/Kosciusko potential strategy



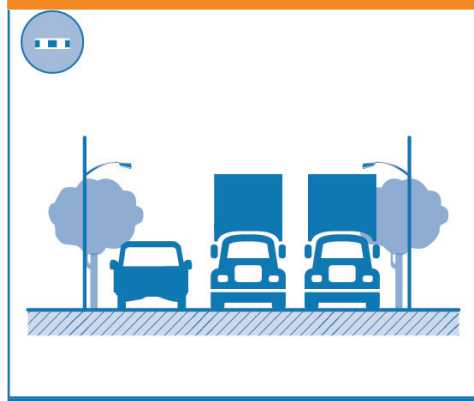
Potential Opportunity & Investment

Assemble land for potential development on a collection of multiple parcels that are currently vacant and/or underutilized.



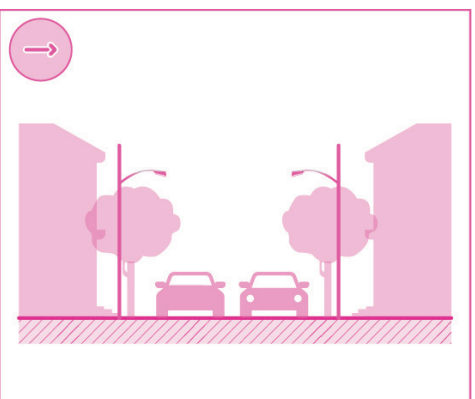
Front Door

Front Door functions as main entrance to a district. Potential improvements include lighting, wayfinding, streetscape, façade improvements, landscaping and street surface upgrades.



Access Street

Access Streets are intended to serve the needs of existing and new businesses and designed to accommodate truck access.



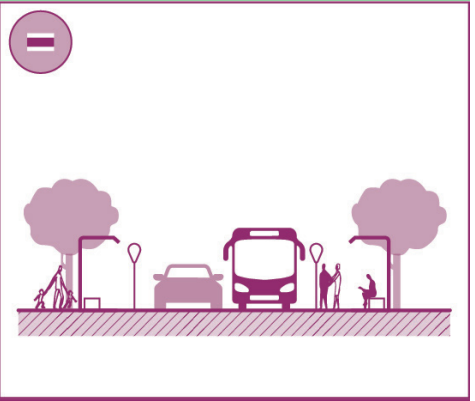
Neighborhood Connector

Designed to establish clear connections between employment districts and adjacent neighborhoods. Potential improvements include wayfinding and landscaping.



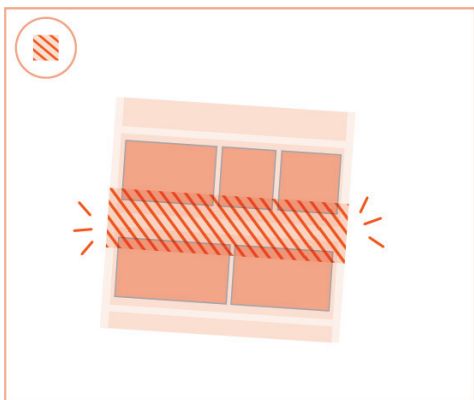
Green Buffer

Green Buffers provide a landscaped separation between industrial uses, rail or highways and nearby neighborhoods.



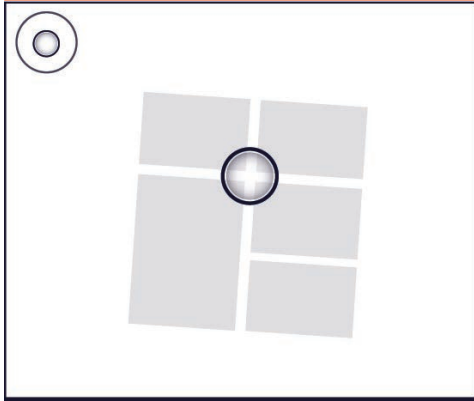
Multi-modal (e.g. MetroLink Expansion)

Multi-modal streets are designed to support multi-modal transportation and transit.



Supporting Commercial Corridor

Support and enhance the existing commercial activity through branding, signage, marketing and streetscaping.



Intersection Upgrade

Intersections are upgraded with crosswalks and entryway signage.

Figure SRK-3. Proposed improvements in South Riverfront/Kosciusko

COMMERCIAL CORRIDORS

Overview

"Commercial corridors" refer to places of commerce and employment that extend multiple blocks and serve local neighborhood and/or regional shopping and service needs outside of larger employment districts and centers. These corridors have been identified through multiple information sources, including the St. Louis Strategic Land Use Plan, citywide land use maps, employment data, and local knowledge from multiple stakeholders. For this plan, commercial corridors are defined as commercial or mixed-use blocks that are not located within a larger employment districts and centers.

A series of analyses were designed to measure each corridor's character, its commercial strength, and its potential for future commercial development. These analyses were combined to produce a measure of the ease with which commercial development could occur on commercial corridors, which is the basis for this section's recommendations. Based on these analyses, a composite score was developed. This score is not intended to indicate where commercial development should and should not happen – those decisions must take into account additional information about local goals, context, and capacity.

Data for corridors were collected for the smallest unit of analysis possible, city blocks, which are demarcated according to intersections and street centerlines. Performing this analysis at the block level allows for the recombination of blocks into customized corridors, a capability that may be desirable in a city where some commercial corridors extend across the entire city and intersect with multiple other corridors along the way.

Two opposing factors shape the commercial corridor analyses and recommendations. Commercial activity cannot be supported at the level it was when St. Louis's population was at its peak. However, the health of commercial corridors across the city is critical to the health of city neighborhoods. Some commercial corridors remain retail and restaurant hubs, but others are struggling due to the loss of jobs and population over many decades. Remaining stores and restaurants are often times proximate to empty buildings or land that discourage customers and new investment. These challenges are compounded by the shifting nature of retail activity in the United States, which has shed and is continuing to shed significant bricks-and-mortar investments. Despite all of these factors, there are opportunities to reinvest in these important corridors and good work is in place to address many of the challenges commercial corridors face across the City. The St. Louis Vacancy Collaborative's 2019-2021 Workplan includes actions to build local capacity and plan for alternative uses for long-vacant property, which is so critical to stabilizing commercial corridors. In addition, the Community Builders Network organized a St. Louis Commercial District Coalition to "share best practices, collaborate and build exposure" for diverse commercial districts across the city. These efforts are important to expand and build upon.

Given the need to upgrade corridors to better serve local neighborhoods and provide business and job opportunities for residents, the city needs to be strategic about how to guide positive change along all corridors in the city and how to measure that change. This framework has developed a process to help identify and measure key characteristics along all commercial corridors in the city. It is a critical step toward understanding how to strategically deploy resources either to improve a corridor that is a shell of its former self or in helping to support small businesses in areas that are just beginning to see investment. A description of the methodology is included below, and this data work should be updated annually to measure progress and guide conversations about potential commercial corridor improvements.

Four measures make up the commercial corridor analysis presented in this plan: corridor character, commercial strength, commercial potential, and a combined commercial strength and potential score. The analysis identifies corridors across the city, including those that have experienced disinvestment, as opportunities for improvement and commercial activity. For instance, S. Grand Boulevard, Virginia Avenue, Chippewa Street and Meramec Street are all identified opportunities that with further improvement can support revitalization efforts in the Dutchtown community. Similarly, parts of N Florissant Avenue, Delmar Boulevard and Dr. Martin Luther King Drive are identified as opportunities in North St. Louis. Improvements to these major historical corridors will support many communities, including Old North St. Louis, The Ville, Kingsway East, and others that are located adjacent to these corridors.

Employment Districts & Centers & Commercial Corridors

Source: Interface Studio, 2019.

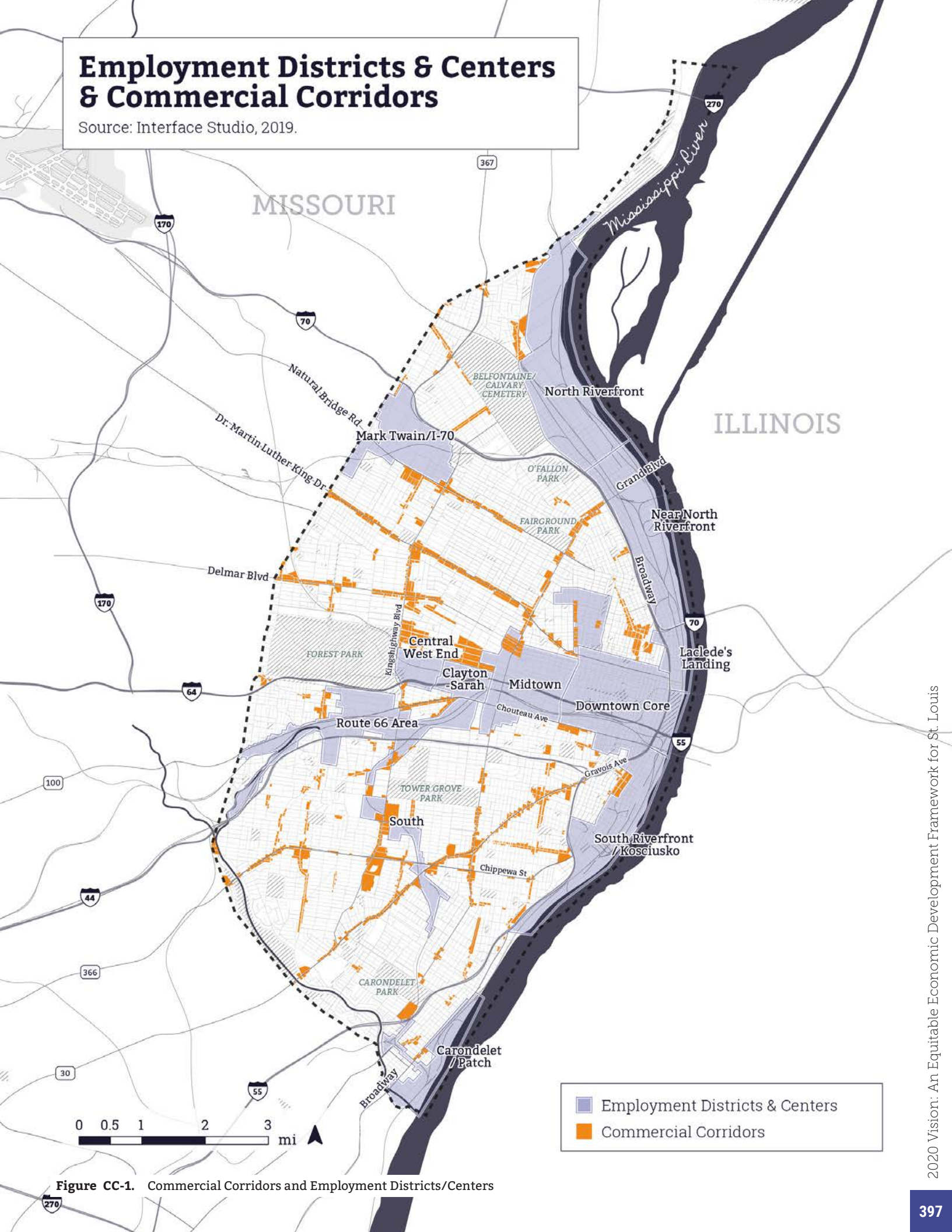


Figure CC-1. Commercial Corridors and Employment Districts/Centers

A SERIES OF ANALYSES WERE DESIGNED TO MEASURE EACH CORRIDOR'S CHARACTER, ITS COMMERCIAL STRENGTH, AND ITS POTENTIAL FOR FUTURE COMMERCIAL DEVELOPMENT.

Corridor Character

Corridor character refers to whether a corridor is neighborhood-oriented or automobile-oriented. These terms are defined in reference to the design elements that make up the corridor, rather than to the particular commercial offerings. Neighborhood-oriented corridors are generally designed for walking; they include smaller buildings, more storefronts, and small building setbacks. Automobile-oriented corridors are designed primarily for cars; they feature large setbacks, larger commercial uses, and large surface parking areas.

This "corridor character" measure is made up of both quantitative and qualitative components. The quantitative measure is the average parcel size within each commercial block, where average sizes less than 0.4 acres are considered more likely neighborhood-oriented and average sizes greater than 0.4 acres are more likely automobile-oriented. This quantitative measure is combined with a qualitative assessment of on-the-ground conditions to confirm block designations. This allows for local knowledge to influence corridor designations, as parcel size alone cannot be considered an adequate measure.

The corridor character assessment is important, as it helps to contextualize the analyses that follow and explain the particular types of market potential that each corridor might have. Automobile-oriented corridors are suited to businesses that cater to pass-through traffic and become a destination when developments are large enough to include a major use like a grocery. Neighborhood-oriented commercial corridors, in contrast, often serve nearby residential areas and may become popular to outsiders due to destination retail or food options. There are examples of both walkable and auto-oriented commercial corridors across the City.



A neighborhood-serving business on Florissant Ave.

CORRIDORS *within* EMPLOYMENT DISTRICTS

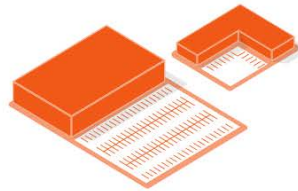
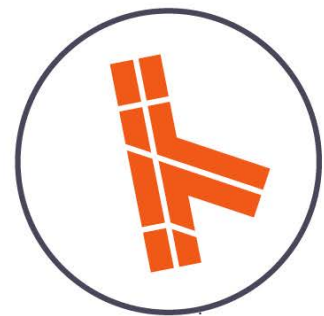


Viability tied to the health of the overall District

CORRIDORS *adjacent to* EMPLOYMENT DISTRICTS

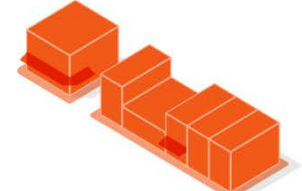


Stand-Alone CORRIDORS



Auto-Oriented

- Primary Drivers:
- Average Daily Traffic
 - Parcel Size
 - Proximity to Employment
 - Visibility
 - Competition



Neighborhood-Serving

- Primary Drivers:
- Character
 - Density
 - Housing Development
 - Walkability



Auto-oriented businesses on Broadway (left) and Gravois (right)

COMMERCIAL CORRIDORS IN ST. LOUIS ARE THE FRONT DOORS FOR THE CITY'S COMMUNITIES.

Commercial Strength Score

For this analysis, a commercial corridor is considered “strong” if it has low vacancy and either a high number of occupancy permits for retail/food service businesses or a high number of employees per acre relative to other corridors in the City. Vacancy was scored based on the proportion of parcels within each block that were vacant land or buildings. Employees per acre was calculated according to data on the number of employees reported to work at firms within 25 feet of a block.³² Occupancy permits for food service or retail businesses were counted from 2015 to 2018.

Vacancy data are considered a high-quality indicator of commercial corridor health across all contexts; however, data on employees per acre and occupancy permits were also used to measure activity in different locations. The decision to score corridors based on either employees per acre or occupancy permits ensured that corridors would not be misrepresented by vacancy data alone. For instance, if a corridor has limited food and retail establishments but is close to an employment district or center and/or ongoing community revitalization initiatives, the data analysis would appropriately identify it as an area of relative strength.

32 YTS, 2018

Commercial Potential Score

For this analysis, a corridor is considered to have “commercial potential” if the community within a 10-minute walk has either high numbers of building permits for new construction or high-income density. Building permits for new construction were counted from 2015 to 2018. “Income density” is a combined measure of population density and median income that seeks to measure the spending potential of a community based upon the density and income of families living nearby. Both measures were calculated for the area within a 10-minute walk of every commercial corridor block.

To measure the potential of corridors for new commercial development, corridors were given the higher or two scores that were calculated for each: a score of all residential building permits since 2015 within a 10-minute walk of every commercial corridor or a score of income density within a 10-minute walk of every corridor.

Each of these data points seeks to call out different types of areas where there may be potential for commercial corridor development. Income density identifies neighborhoods that already have some level of stability and spending power, while the building permit measure will call out areas where there is a significant amount of new residential growth – where new affordable housing, community initiatives, or private investment is taking hold – regardless of population density or median income. By scoring blocks on whichever measure they perform better, this analysis results in potential growth opportunities in many different parts of the city including portions of Natural Bridge Avenue, Dr. Martin Luther King Drive, Delmar Boulevard, North Grand Avenue, and Gravois Avenue, among others.

HOW ARE THE SCORES PUT TOGETHER?

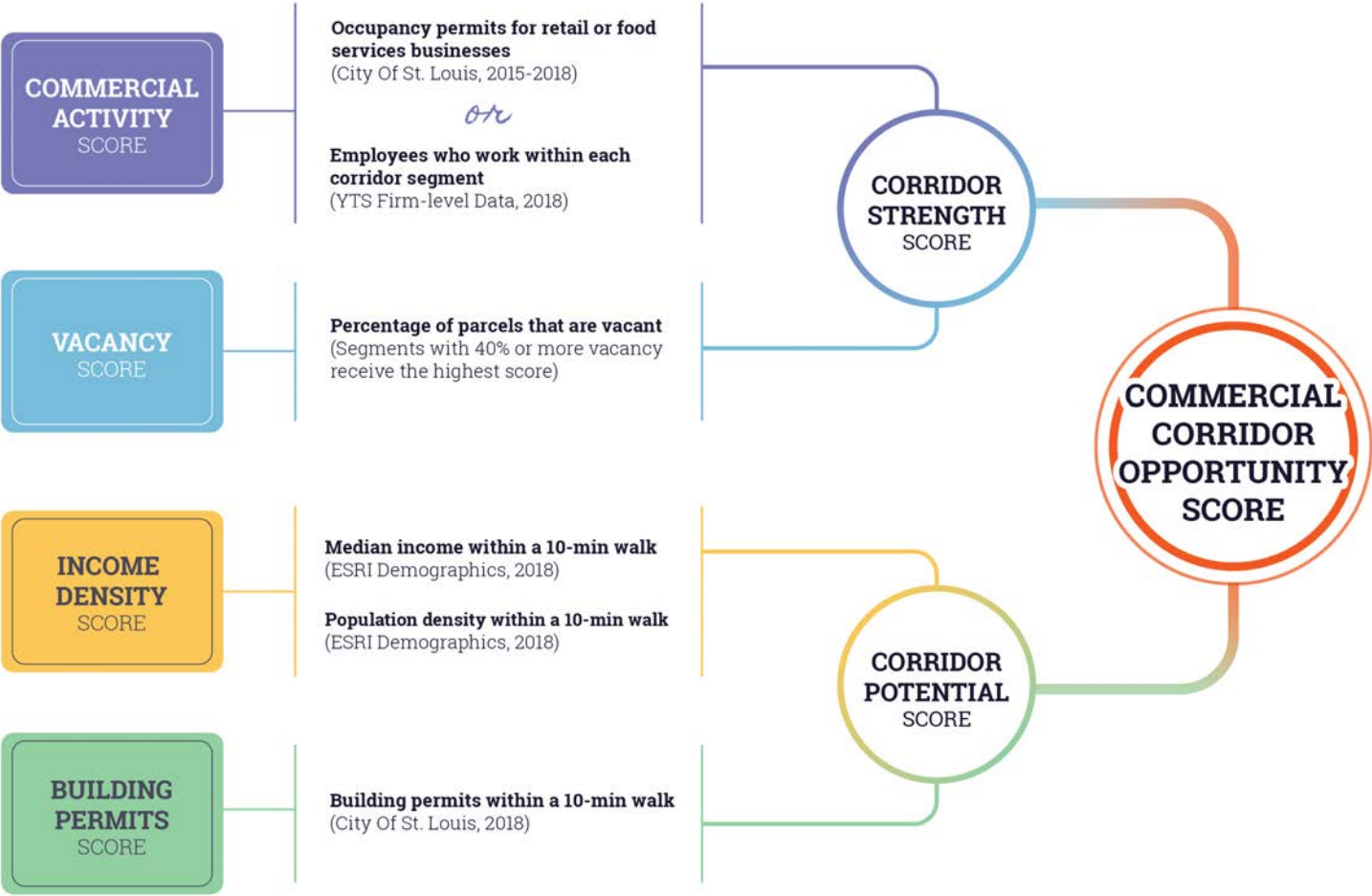


Figure CC-2. Commercial score calculation process

Commercial Strength and Potential Score

The final measure of commercial strength and potential combines the two previous scores to understand whether corridors are strong, have commercial potential, both, or neither. The outcome of this analysis is intended to help guide further planning and future investment. As a framework, it is flexible and must be adjusted for characteristics that are harder to measure, like local capacity. For instance, it will be more difficult to bring new commercial development and services to areas of low commercial strength and potential, but this does not mean these corridors are not worthy of investment. The goal should be to work

with residents to develop a vision and action plan that will better enable these corridors to serve adjacent neighborhoods better than they do currently. With sustained action, the scoring for specific corridors will change, and local planning and investment should change accordingly.

The opportunity score can be used to help align the needs of different corridors with the right menu of improvements. Traditionally, commercial corridor improvements include planning and research, management, infrastructure and development. Not all types of activities and improvements are relevant for each corridor. A corridor with a lot of vacancy may indeed need some market research to determine what kinds of uses are possible but likely does not need parking management which is more often an issue for corridors with a lot of existing commercial activity. The opportunity score, along with an understanding of local capacity and ongoing or proposed investment, was used to identify four general types of commercial corridors in the City:



Figure CC-3. Commercial Corridor improvements

- › **Transform** – corridors that have experienced some of the most difficult challenges to quickly overcome. They are characterized by extremely high vacancy rates and with very little recent investment taking place in surrounding communities. These corridors are an opportunity to consider a wider range of activities from community greening and gardening to new housing. To help determine the specific vision, each is in need of specific corridor planning with local leadership and should seek to access city tools and services, including rezoning, land assembly, blight removal and cleaning.
- › **Grow** – corridors that are beginning to see investment but additional assistance is needed to maximize this interest and provide opportunities for MWBE and small businesses. For instance, S. Grand Boulevard and Cherokee Street are already hubs for minority-owned businesses. The provided opportunities, which can spur more activities, can support and grow these areas. These corridors would benefit from the activities identified above along stabilize corridors but also demonstrate opportunities for new development. Incentives for new investment and development are necessary in these areas and added investment in streetscape design, marketing and tenant attraction is warranted.
- › **Preserve** – corridors that represent the strongest commercial and retail areas of the City. The intent is to ensure they remain strong locations for this activity. Some of these corridors are large enough to consider a CID management structure similar to the corridors that have already taken this step. Continued investments in infrastructure and streetscape will help these corridors to retain their businesses and attract customers.
- › **Stabilize** – corridors that have some existing commercial activity and serve nearby residents but also suffer from empty land and buildings. The need in these locations is to stabilize the commercial activity such that further vacancy and store closures can be prevented. New uses should be considered for empty commercial spaces including small offices and new small businesses. These corridors need a range of activities including cleaning and greening, market research, retail assistance (including merchandising and business planning for existing businesses), property improvements (façade grants and signage), infrastructure upgrades for sidewalks and crosswalks where appropriate, potential public art and land assembly for potential future development.

Vision

There is no one vision for commercial corridors across the city, as each corridor has its own history, personality, and current needs. The commercial corridors in St. Louis are the front doors for the city's communities. As such, they need creative strategies that support the needs of nearby communities and provide job opportunities for residents. Commercial corridors should indeed remain central to providing a home for locally-serving retail and commercial services where possible. However, these corridors should also showcase the creativity and resolve of the city and its residents by providing locations for greening, stormwater management, community gardening, community uses, new housing, and small offices that provide a range of job opportunities in the city. Commercial corridor revitalization can also be aided by attraction of second-stage and other small- and mid-sized businesses, which add to foot traffic and consumer activity during day-time hours. A menu of potential improvements will be tailored to the needs of each corridor through the assistance of nearby neighborhood leaders and business owners.

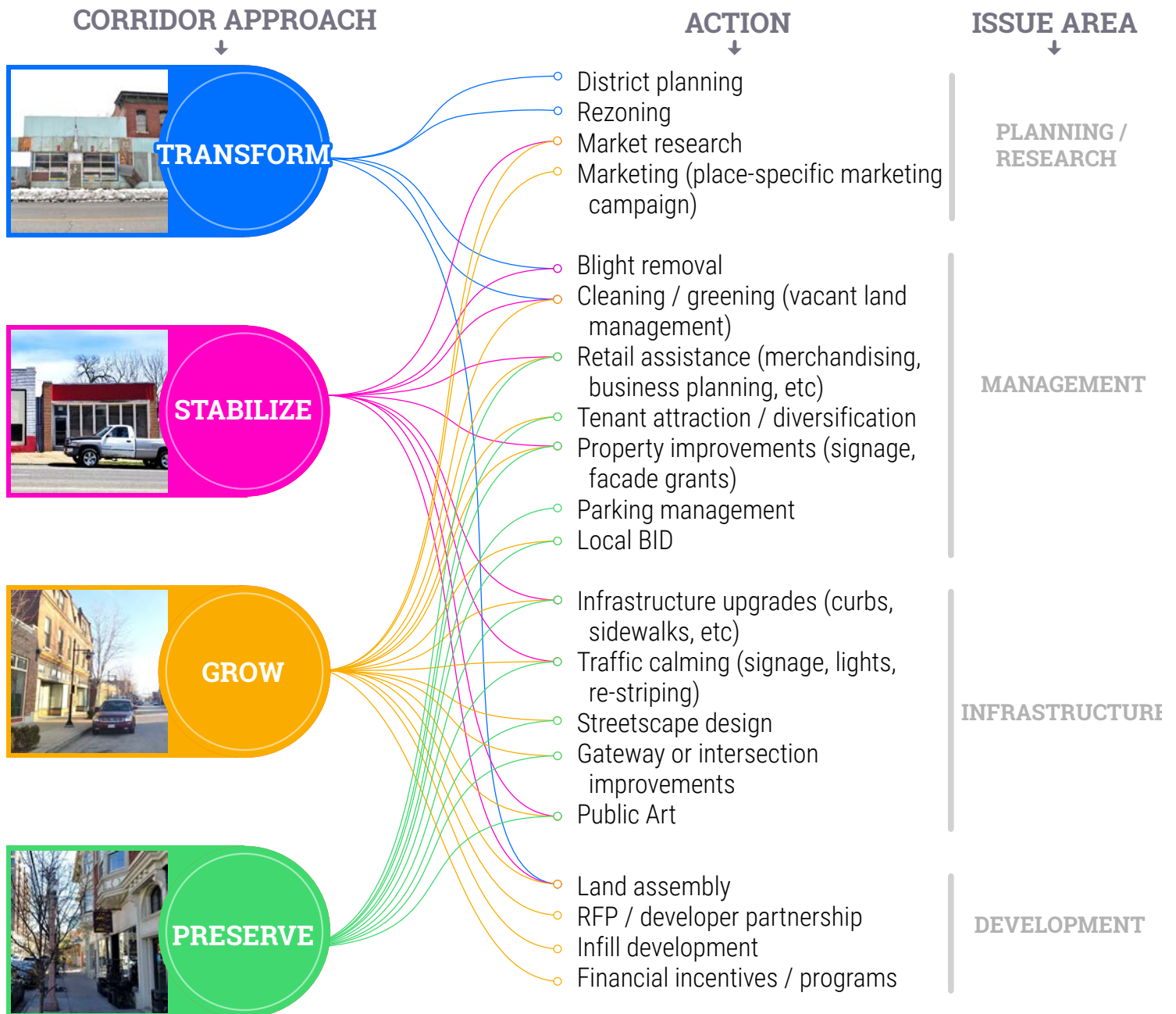


Figure CC-4. List of actions by Commercial Corridor type

Strategies and Action Items

Strategy 1

Annually measure the health of commercial corridors across all St. Louis neighborhoods

The data analysis undertaken to provide a picture of conditions along commercial corridors is not, and should not, be a one-time undertaking. Planning, improvements and private investments will change the character of different corridors. To ensure strategies are aligned with the needs and condition of commercial corridors, an annual data update is necessary. The main changes in the composite score described above should be clearly identified and discussed in an annual St. Louis commercial corridor summary.

Action Item #: <u>CC-1.1</u>	Undertake an annual commercial corridor data analysis and track conditions over time
Leader	Commercial District Managers, SLDC
Potential Partners	Commercial District Coalition, Planning & Urban Design Agency, Vacancy Collaborative, local CDCs
Start Time	Year 1
Duration	1 year
Effort to Implement	Low
Potential Funding	SLDC, Planning & Urban Design Agency
Goal/s	Annual commercial corridor update, coordinate findings with the new retail expert at SLDC
Tracking Progress	Updated commercial corridor analysis

Strategy 2

Create a new Main Streets initiative

Successful commercial corridor programs in cities of all types rely on effective corridor management either through a high-capacity neighborhood community development corporation, a dedicated commercial businesses association or CID. Recognizing that different neighborhoods have very different capacities to undertake and guide revitalization activities, a city program is necessary to ensure equitable attention across commercial corridors. A Main Street program would help to provide dedicated staff based around distinct geographies in the city to work with local business owners, identify specific improvements and work to connect corridors with incentives and business development programs. The city once had such an initiative. Now with increasing development in different corners of St. Louis and transformative proposals like the Greenway, this is an ideal time to design a program to bring additional assistance to commercial corridors in need of improvement and business expansion.

Project interviews highlighted that (real or perceived) crime is one of the key challenges facing commercial corridors across the city, and local interventions to reduce crime are often very costly. One of the first initiatives for the Main Streets program should be to share knowledge and best practices about crime reduction strategies that have worked locally and nationally.

Action Item #: <u>CC-2.1</u>	Outline a Main Streets proposal including necessary funds and staffing
Leader	Planning & Urban Design Agency, SLDC
Potential Partners	Board of Aldermen, Community Builders Network, Commercial District Coalition, Invest STL, Promise Zone staff, local CDCs
Start Time	Year 1
Duration	2 years
Effort to Implement	High
Potential Funding	Missouri Main Street Connection; local philanthropic match
Goal/s	Main Street program proposal tailored to the needs of different types of corridors across the city
Tracking Progress	Number of businesses served, change in employment within Main Street corridors
Action Item #: <u>CC-2.2</u>	Utilize the Main Streets program to share knowledge and best practices for crime reduction interventions along commercial corridors
Leader	Planning & Urban Design Agency, SLDC
Potential Partners	Board of Aldermen, Community Builders Network, Commercial District Coalition, Invest STL, Promise Zone staff, local CDCs, universities
Start Time	Year 2
Duration	Ongoing
Effort to Implement	Medium
Potential Funding	Local philanthropy
Goal/s	Mine local and national best practices; gain insights from partners working in related disciplines; support corridor vitality
Tracking Progress	Number of identified and implemented interventions; reduction in real (or perceived) crime

Strategy 3

Align investments along commercial corridors to best support surrounding communities and existing and small business owners

Given the number of commercial areas across the city, it will be important to focus planning and investments on a few key opportunities in each general type of corridor. This includes identifying priorities in "transform," "stabilize," "grow," and "preserve" corridors. Along with the data update, city and local leaders should evaluate identified opportunity areas and grassroots efforts each year. The Opportunity Trust, which aims to significantly increase the number of children attending world-class public schools, should be actively integrated into this discussion around where potential new school sites should be considered in the context of commercial corridor opportunities for growth and investment (e.g., Cleveland High School building and site). The following corridors should be considered and discussed as initial focus areas:

Transform Corridors:

- > N. Grand Blvd. from Delmar to Fairgrounds Park to leverage the proposed Brickline Greenway and from Fairground Park north to Florissant Avenue;
- > Dr. Martin Luther King Blvd. from Euclid Avenue to N. Newstead Avenue;
- > Florissant Avenue from St. Louis Avenue to 14th Street;
- > N. Broadway from Halls Ferry Road to Christian Avenue; and
- > S. Broadway from W. Tesson Street to Loughborough Avenue.



Stabilize Corridors:

- > Natural Bridge Avenue between N. Kingshighway Blvd. and Arlington Avenue;
- > Dr. Martin Luther King Jr. Blvd. from Semple to Clara Avenues;
- > W. Florissant Avenue from Riverview Blvd. to the city limits;
- > Chippewa and S. Jefferson Avenue (includes St. Alexius Hospital and Lutheran School of Nursing); and
- > Virginia Avenue from Bates to Walsh Streets (including the Virginia Theater)



>

Grow Corridors:

- > Delmar Blvd. from the Delmar Loop to N. Taylor Avenue;
- > Cherokee Street from Gravois Avenue to S. Broadway;
- > S. Grand Blvd. from Gravois Avenue to Meramec Street and over to Virginia Avenue;
- > Gravois Avenue from Taft Avenue to Bates Street; and
- > 14th Street Mall between St. Louis Avenue and Warren Street.



>

Preserve Corridors:

- > All corridors identified in the analysis with low vacancy.



COMMERCIAL CORRIDOR REVITALIZATION CAN ALSO BE AIDED BY ATTRACTION OF SECOND-STAGE AND OTHER SMALL- AND MID-SIZED BUSINESSES, WHICH ADD TO FOOT TRAFFIC AND CONSUMER ACTIVITY DURING DAY-TIME HOURS.

Action Item #: <u>CC-3.1</u>	Identify opportunity areas and develop action plans
Leader	Planning & Urban Design Agency, SLDC Commercial District Managers
Potential Partners	Community Builders Network members, Commercial District Coalition, Promise Zone staff, Vacancy Collaborative, local CDCs
Start Time	Year 1
Duration	1 year
Effort to Implement	Medium
Potential Funding	TBD
Goal/s	Targeted investment plan for specific corridors
Tracking Progress	Updated commercial corridor analysis
Action Item #: <u>CC-3.2</u>	Encourage second-stage businesses – those with 10 to 30 employees but also potential growth needs – and anchor institutions in need of new space to anchor different corridors (where space is available)
Leader	SLDC
Potential Partners	Commercial District Coalition, Promise Zone staff
Start Time	Year 1
Duration	2 years
Effort to Implement	High
Potential Funding	TBD
Goal/s	Align business and corridor growth, establish anchors along commercial corridors
Tracking Progress	Updated commercial corridor analysis

Commercial Corridor Analysis: Commercial Strength INITIAL FOCUS AREAS

Source: City of St Louis (2018), YTS firm-level data (2018), ESRI Demographics (2018), Mass Economics; analysis by Interface Studio.

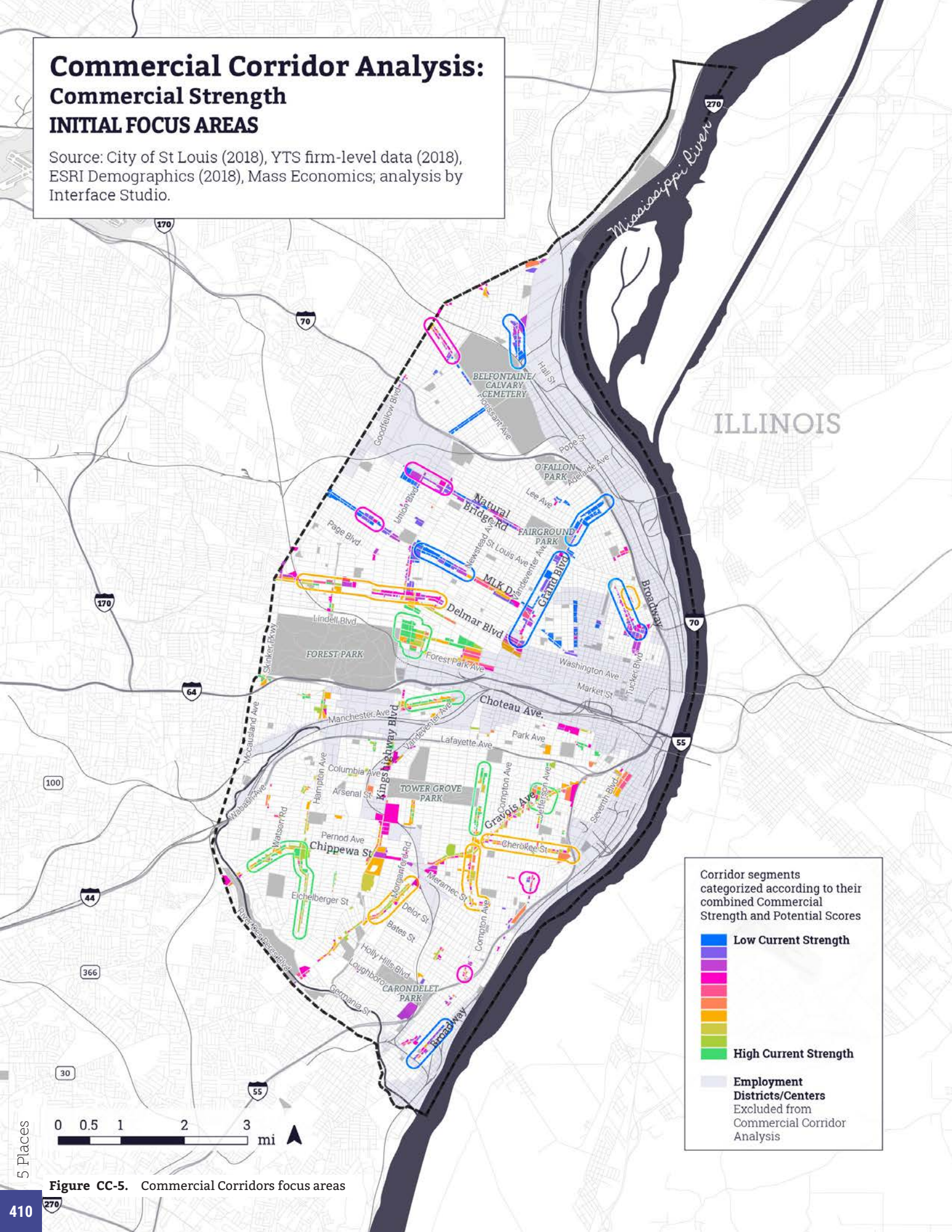
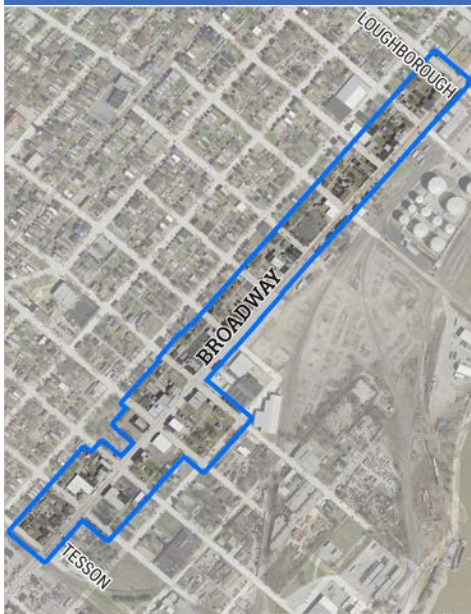


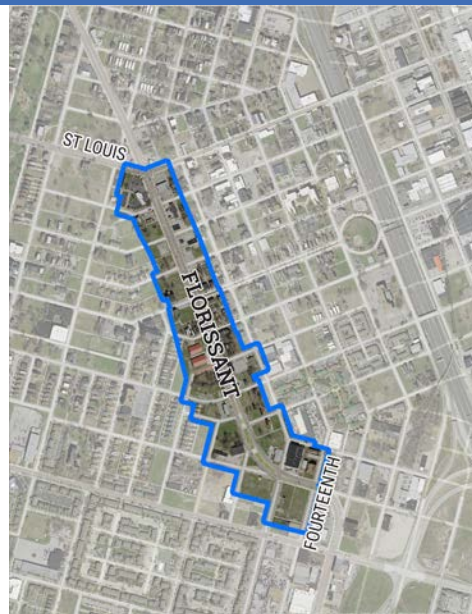
Figure CC-5. Commercial Corridors focus areas

Transform Corridors



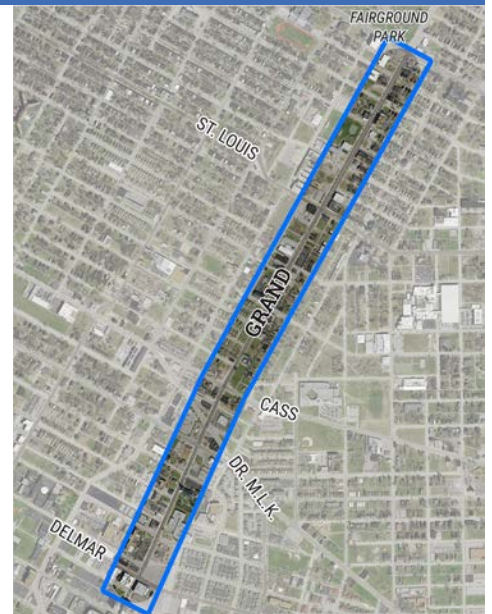
SOUTH BROADWAY NEEDS:

Marketing, building stabilization, land assembly, tenant attraction, blight removal



FLORISSANT NEEDS:

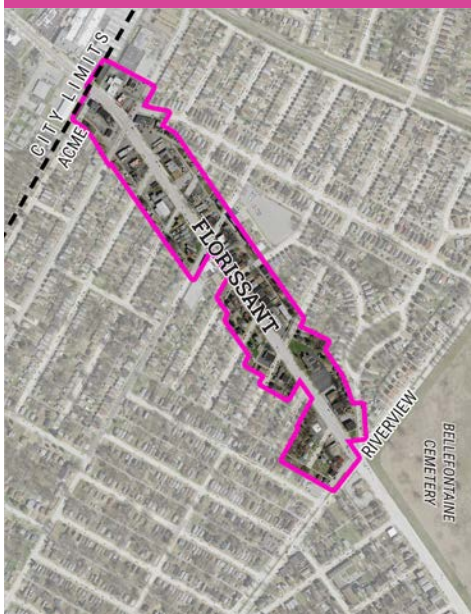
Improved crosswalks, traffic calming, lighting, signage, marketing, art, new businesses, blight removal, additional housing



GRAND NEEDS:

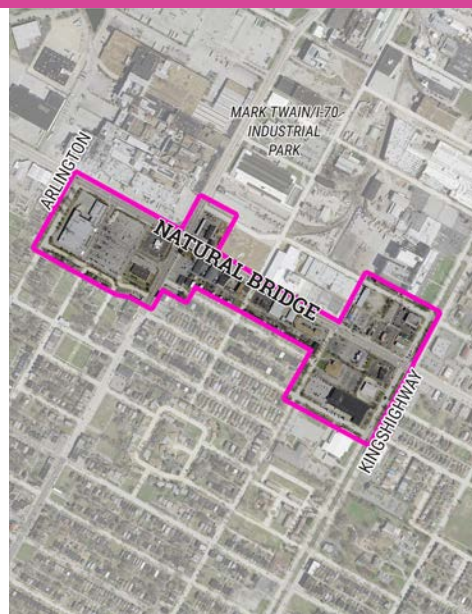
Integration of Brickline Greenway, corridor planning, blight removal and land assembly

Stabilize Corridors



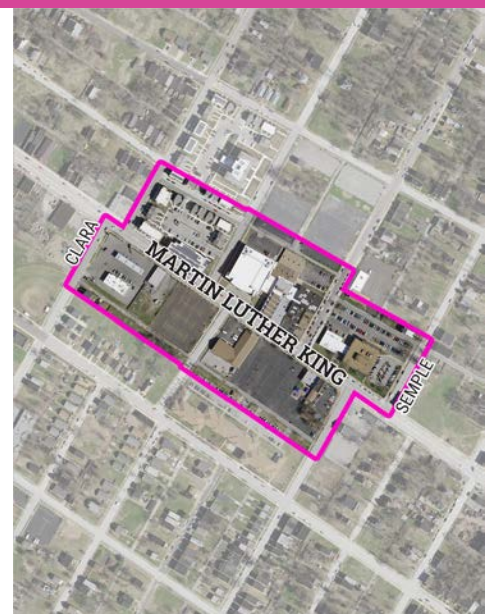
FLORISSANT NEEDS:

Marketing, retail assistance, property improvements, traffic calming and signage, cleaning and greening



NATURAL BRIDGE NEEDS:

Improved crosswalks, traffic calming, lighting, signage, blight removal.



DR. MARTIN LUTHER KING NEEDS:

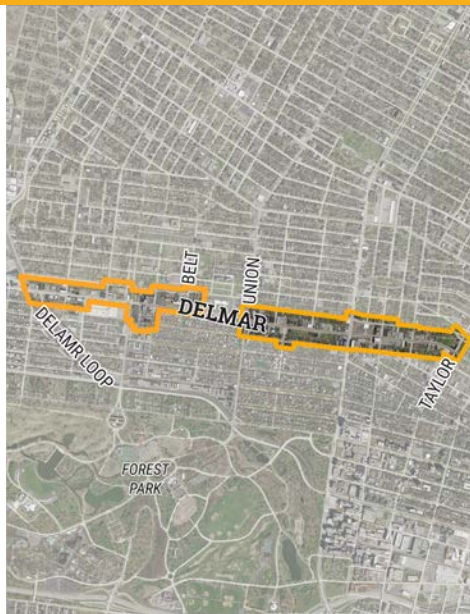
Tenant attraction, market research, signage, public art, land assembly

Grow Corridors



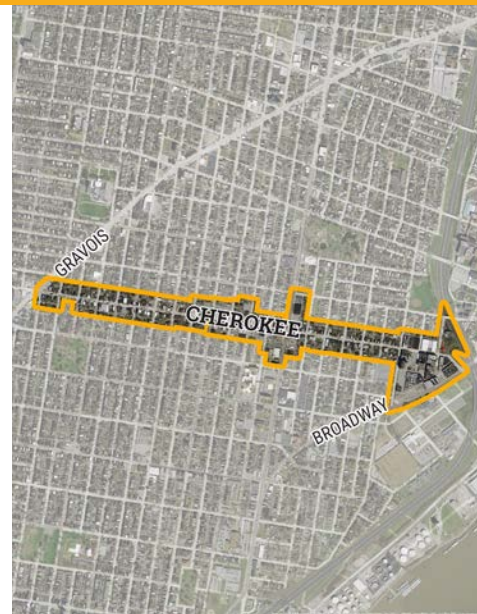
14TH NEEDS:

Market research, retail assistance, tenant attraction, property improvements, targeted incentives, gateway improvements - clear connection to Brickline Greenway



DELMAR NEEDS:

Improved crosswalks, traffic calming, lighting, signage, marketing, art, tenant attraction, land assembly, blight removal, infill development, additional housing nearby



CHEROKEE NEEDS:

Marketing, retail assistance, tenant attraction, property improvements, streetscape design, public art, infill development, targeted incentives

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